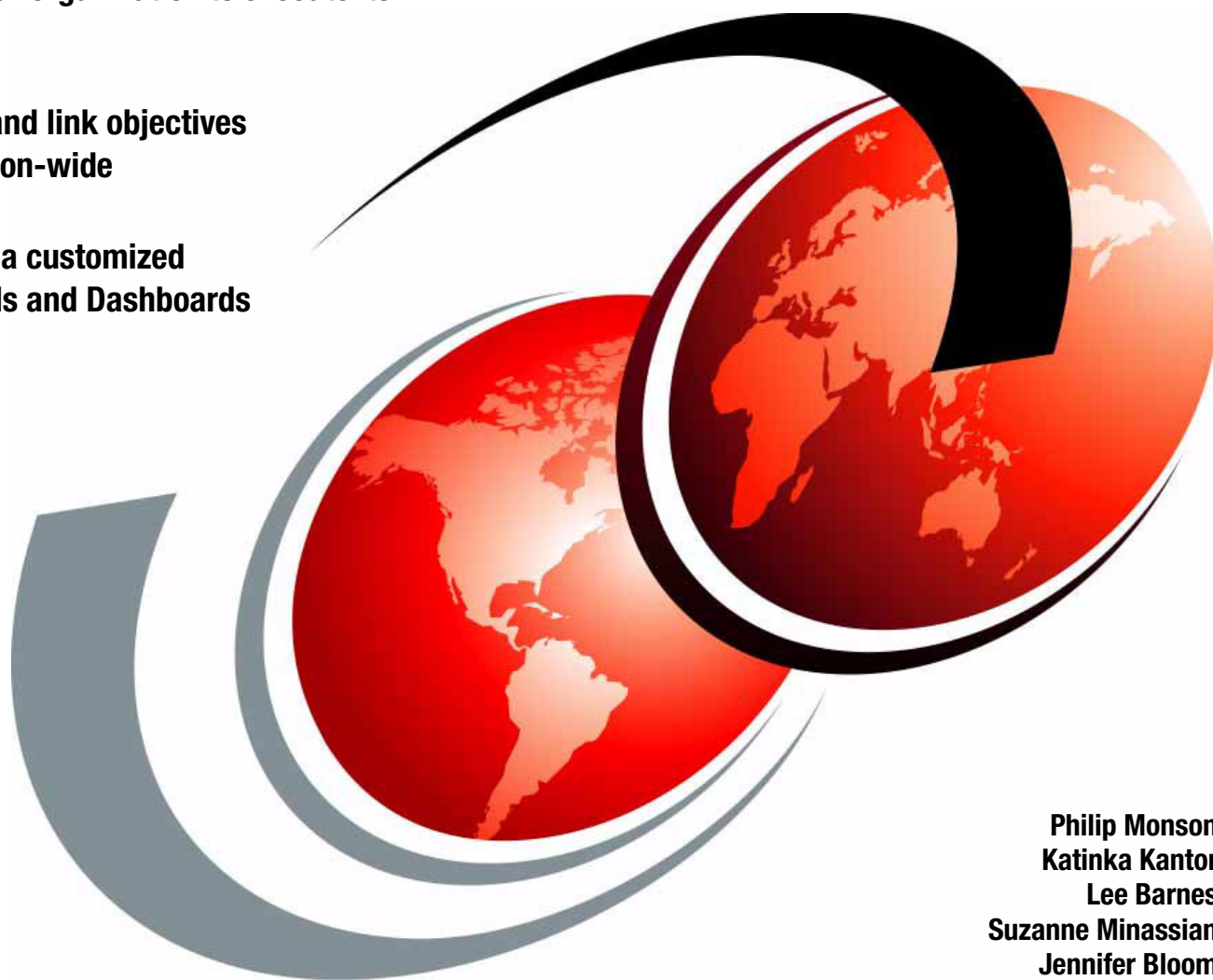


IBM Workplace for Business Strategy Execution

Enable your organization to execute its
strategy

Cascade and link objectives
organization-wide

Monitor via customized
Scorecards and Dashboards



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International Technical Support Organization

IBM Workplace for Business Strategy Execution

June 2006

Note: Before using this information and the product it supports, read the information in “Notices” on page vii.

First Edition (June 2006)

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Preface

IBM® Workplace™ for Business Strategy Execution utilizes portal, collaboration, and application integration technologies and adds unique capabilities specifically for organizations to manage the achievement of objectives - all presented to the user in a single, useful user experience. Effective strategy execution can be improved by effectively aligning business units and workgroups to corporate objectives, assigning accountability, monitoring progress, and accelerating exception resolution. Workplace for Business Strategy Execution delivers intuitive alignment and insight through actionable scorecards and in-context dashboards.

This IBM Redpaper will guide you through the introduction of Workplace for Business Strategy Execution in your environment using a two organization scenario - one large, one small - to illustrate.

The team that wrote this Redpaper

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Strategy concepts underlying IBM Workplace for Business Strategy Execution

Most organizations are directed by a series of strategies and supporting objectives that have been developed over time and modified to meet new challenges. In this chapter, we will provide some background and suggestions for adapting your organization's strategic plans to obtain maximum value from Workplace for Business Strategy Execution. In particular, we:

- ▶ Describe a framework for strategic planning concepts underlying Workplace for Business Strategy Execution
- ▶ Orient the reader to particular concepts and terminology used in Workplace for Business Strategy Execution

This chapter discusses the following topics:

- ▶ The classic framework used for many strategic plans
- ▶ Important contributions introduced by the Balanced Scorecard
- ▶ The framework employed by Workplace for Business Strategy Execution

In this chapter, we also introduce two illustrative organizations and the challenges they face. Each organization serves as a scenario throughout the Redpaper to trace how an organization - one large, one small - would introduce Workplace for Business Strategy Execution.

1.1 A roadmap for this Redpaper

Some readers of this Redpaper will have specific topics they are seeking. To help guide readers to specific topics that they are seeking, Table 1-1 is a mini-guide to the Redpaper that depends on your role and interests related to strategic planning and execution.

Table 1-1 Chapters most helpful to you

| What is your role in the company's strategy? | Most helpful chapters |
|-----------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| I set the strategy for my organization or department. | 1, 2 |
| My organization has not decided on a tool, but we are interested in something like this. | 1, 2, 3 |
| I am interested in deploying Workplace for Business Strategy Execution in my organization. | 2, 3, 4 |
| I am going to be managing the implementation and administration of Workplace for Business Strategy Execution for my organization. | 3, 5, 6, 7, 8 |

Note: The Redpaper team used Workplace for Business Strategy Execution Version 1.0 Team Edition in the Redbooks lab to develop and discuss the scenarios contained within this Redpaper. There is also an Enterprise Edition available, which is based on a different portal version. Please note that the Workplace for Business Strategy Execution technology works the same in both editions, and this redbook provides product information relevant to both editions.

For more detail on the Workplace for Business Strategy Execution Version 1.0 Team Edition and Enterprise Edition, please see 3.1.1, "Choosing an edition of Workplace for Business Strategy Execution" on page 26.

Following is a brief profile of the chapters in this Redpaper.

Chapter 1. Strategy Concepts Underlying Workplace for Business Strategy Execution

For strategic setters, executive planning teams, scorecard owners, and the planners assisting them.

A short profile of strategic plan concepts and the requirement for strategy execution that Workplace for Business Strategy Execution helps meet.

Chapter 2. Product Overview

For scorecard owners and planners assisting them.

A short description of Workplace for Business Strategy Execution's main features and how they meet strategy execution needs.

Chapter 3. Getting Started

For scorecard owners.

A guide to preparing and setting up objectives and initiatives in Workplace for Business Strategy Execution and for designing reports.

Chapter 4. Scorecards

For scorecard owners.

Directions for managing the key elements of scorecards: objectives, initiatives, and linkages. How to use the scorecard for deciding on remedial action.

Chapter 5. Creating Objectives, Setting Targets and Tracking Progress

For scorecard owners, planners assisting them, and Workplace for Business Strategy Execution Administrators.

The tools for creating objectives and setting targets using the Target Scheduler, as well as scenarios for setting up different types of objectives.

Chapter 6. Dashboards

Principally for Workplace for Business Strategy Execution administrators, but also for scorecard owners wishing to know more about dashboard design.

An introduction to one of the key features of Workplace for Business Strategy Execution, including the design and creation of dashboards.

Chapter 7. Data Sources

Principally for Workplace for Business Strategy Execution administrators.

Steps and examples for connecting to external sources for setting up scorecards and for reporting actual results to the user interfaces.

Chapter 8. Administration Basics

For the Workplace for Business Strategy Execution administrator.

Guidance for Workplace for Business Strategy Execution setup, configuration, and commonly-used administrator features in the product.

Appendix A. Looking Forward

For the Workplace for Business Strategy Execution administrator and others planning for implementation in their organization.

Some of the features that you can expect in the next version of Workplace for Business Strategy Execution. For the Workplace for Business Strategy Execution administrator and others planning for implementation in their organization.

Additional Materials

For the Workplace for Business Strategy Execution administrator.

A sample Domino Web service and database to try with Workplace for Business Strategy Execution.

Glossary

A guide to the terminology used by Workplace for Business Strategy Execution and in this document.

Related Publications

Some other resources, in print and on line, that Workplace for Business Strategy Execution users and administrators may find helpful.

1.2 What is missing in strategic plan execution?

In many, especially large, organizations, business strategies were created by a team of senior executives and selected business unit managers, assisted by full-time planners and finance staffs. The strategies that emerged often involved hard choices among alternatives, leaving little intellectual energy, if time, for translating the strategy into the myriad of concrete steps to carry it out. Consequently, the strategy was fed into the business unit's annual planning cycle piecemeal, with an incomplete understanding of the overall goals and absence of agreement on the right steps to reach them. The scope for possible misunderstanding and incomplete execution was enormous.

We are going to walk through two scenarios of organizations to illustrate the difficulties in executing plans developed in this way. First, we will discuss a scenario from the property/casualty insurance industry, where the environment is decentralized, the strategy common, and the interpretation of the strategy inconsistent. Then, we will learn the challenges faced by a smaller, non-profit organization, who must respond rapidly to constantly changing finances while manually managing the organization.

ITSO Insurance, an enterprise insurance company

Insurance companies that cover the risks of commercial organizations face formidable challenges in managing their business. One challenge is inherent in the product: not knowing the cost of an insurance policy for a year (or longer) after the policy is sold. Other challenges relate to the organizational structure and location of underwriting decisions:

- ▶ **Functional organization structure:** Typical of many property/casualty insurance companies, ITSO Insurance Co. is organized by a few major functions, that is, just below the CEO are: Agency (sales), Underwriting, Administration and Claims, and Investments. Consequently, for most elements of the company's profit and loss statement (that is, how ITSO Insurance earns a surplus for policyholders and shareholders), responsibility is shared by two or more functions, which can lead to weak management if responsibilities are not carefully defined.
- ▶ **Decentralized decision-making:** To evaluate commercial risks accurately, most individual risk decisions are made by field underwriters located in ITSO Insurance's 25 branch offices around the country. Branches are located to be near the risks they are writing and to help them understand the local environment (that is, economic and client business) and any state-by-state regulations. A key challenge for managing the network of branches is ensuring that each branch correctly interprets and applies, for its local environment, objectives and initiatives set at the home office. Such objectives can be designed to, for example, reduce the impact of a loss-making type of insurance (for example, commercial fleets of vehicles) or take advantage of a new business opportunity in the market.

ITSO Science Museum, a non-profit organization

Smaller organizations face other difficulties in executing strategy. For example, many non-profit organizations are driven to keep their operational expenses contained while extending programs and seeking funding. The environment is highly variable.

ITSO Science Museum is a children's museum devoted to science, principally, the physical sciences, such as physics and astronomy. Most of the museum's exhibits are permanent. Others exhibits are rented for periods of 2-3 months each from the exhibit owners, some of whom are other children's museums, which created them.

Like many other children's museums, ITSO Science Museum depends on outside funding, from corporate donations, foundation grants, and fees paid by schools for special programs. The outside funding usually closes the gap between expenses and visitor revenues, that is, entry fees for day visitors and dues paid by members.

Most of the museum's exhibits are permanent, while others travel from one museum to another and remain for two to three months, for which rentals are paid to the exhibit's owner. The traveling exhibits and programs offered to groups each year can vary widely depending on the funds the organization is able to attract.

With programs and exhibits changing each year (or more frequently), it is difficult to keep a perspective on how the entire organization is running. One challenge for a non-profit organization is continually planning with unknown funding:

- ▶ Some organizations will apply for grants and base their events and special exhibits on when a grant or donation is received.
- ▶ Other organizations will plan a year's program of exhibits and events and then find sources to pay for various elements of the program.

Non-profit organizations in either category can suffer from:

- ▶ Lacking a way to rapidly respond to the changing priorities caused by the unpredictability of major grant and donations.
- ▶ Inability to visualize the overall funding levels that the organization has to work with at any given moment and what funding may be expected to arrive in the near term.

With profiles like these in mind, managers and strategic planners have been at work for years to develop frameworks for overcoming these kinds of problems.

1.3 Strategic planning frameworks in wide use

Perhaps no aspect of strategic planning has developed as dramatically as the tools available to execute strategies. In this section, we briefly trace the impact of the Balanced Scorecard, starting with the framework that preceded it over 20 years ago. We then highlight the challenges which emerged, just at the time that technology has become available to help meet those challenges.

1.3.1 Framework 1: mission, goals, objectives, and action steps

Strategic plans require considerable intellectual and analytical effort to establish and maintain. Typically, they are updated once a year and seek to achieve goals within three to five years. At a minimum, they include, either explicitly or implicitly, four elements: mission, goals, objectives, and action steps:

- ▶ Mission is typically a description, in one or more carefully-worded sentences, of an organization's role with respect to its market and, if applicable, parent organization. It often includes the organization's qualitative attributes that enable it to achieve its goal, for example, "To be [role in chosen markets] to [key client groups] by [sustainable competitive attributes]".
- ▶ Goal is a statement of what an organization wants to become or achieve, reflecting its priorities, which will enable it to fulfill its mission, for example, "To become [qualitative descriptor, in relation to the market], by [primary method or changes required]". Some organizations create a goal for each major function, such as production, sales, or human resources.
- ▶ Objective is a more specific statement of a portion of the goal, indicating the means to achieve the goal, including a quantitative target, if applicable, and a target date, for example, "By [month or year], to achieve a share of [%] in the [specific] market."

- Action program is one of the major steps needed to achieve the objective. Typically, multiple steps are needed to achieve an objective, for example, to achieve a target market share, there might be supporting programs for raising sales force productivity, expanding the size of the sales force, improving client service, and rebranding a product.

Mission and goals are expected to remain constant for multiple years, while objectives and plan steps typically have target dates within one or two years. The two dimensional form of these elements leads many organizations to display them in worksheets.

1.3.2 Framework 2: the Balanced Scorecard

First introduced in 1992 by Drs. Robert S. Kaplan and David P. Norton in the *Harvard Business Review*¹, the Balanced Scorecard was particularly innovative in raising key non-financial goals and objectives to the level of financial objectives and ensuring that individuals' objectives were synchronized ("aligned") with others in a position to contribute to the achievement of those objectives. The term *Balanced Scorecard* grew to include some elements of management that were widely known and understood earlier, but gained new prominence with its emphasis on execution of business strategies.

Two concepts are at the core of the Balanced Scorecard's framework: perspectives and alignment.

Perspectives

The Balanced Scorecard formally identified four dimensions, called perspectives, that a strategic plan should cover, only one of which is financial:

- Financial
- Customer
- Learning and growth
- Internal processes

A look at a sample of recent corporate annual reports suggests that many companies now have objectives for multiple perspectives in their strategic plans. The perspectives they use are not necessarily those listed above, and some have more than four perspectives, but they all have raised non-financial perspectives to a level of importance comparable to the financial perspective.

Alignment

A core concept of the Balanced Scorecard is *alignment*, that is, matching the scorecards of all individuals in a position to contribute substantively to the achievement of a corporate objective. Alignment involves three steps:

- Cascade objectives: The first, and most important, requirement for alignment is that objectives on scorecards at each level are linked to the scorecards at the next level immediately above, and, ultimately, to the scorecard for the senior executive in the organization. The cascading process begins with the scorecard begins with that executive's scorecard and works down to individuals at succeeding levels, so that each individual's scorecard represents their role in achieving the objectives above. A scorecard can have one or two objectives unique to its owner's other responsibilities, but a scorecard without any links to the overall strategy is reason to question the scorecard owner's objectives in the organization.

¹ "The Balanced Scorecard: Measures That Drive Performance", Robert S. Kaplan and David P. Norton, Harvard Business Review, January-February 1992.

- Apportion objectives: Objectives at every level should contribute to the objectives at the next level up. For objectives at one level measured quantitatively, they should, combine arithmetically (for example, addition or multiplication) to an objective at the level immediately above. Non-quantitative objectives should at any one level should, in combination, enable achievement of the corresponding level above.
- Choose consistent metrics: Scorecards should incorporate measures that meet long-term goals. They should also be consistent at each organizational level and between levels. For example, the regional sales objectives in Figure 1-1 are all measured in dollars of booked business (consistent at one level and between levels). The metrics for the two other objectives within the regions are similarly consistent, because they are the two components that enable a region to meet its sales target.

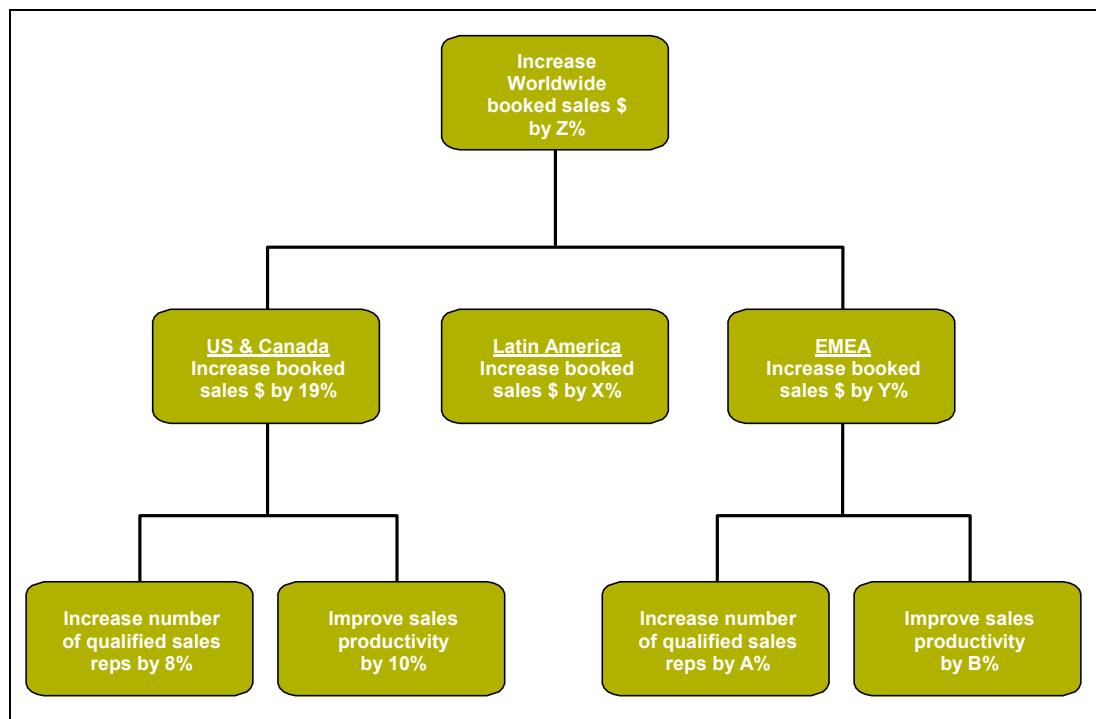


Figure 1-1 Objectives with consistent metrics

1.3.3 Remaining challenges in strategy execution

Once organizations realized the major improvements to their plans by adopting either framework, the spotlight shifted to some important challenges in first setting up the plans and then managing their execution. Most of these challenges existed before the frameworks, but overcoming them now becomes imperative, to ease the adoption of the new framework and to realize its value.

The classic framework left organizations with some major gaps in managing the execution of their strategies:

- Dominance of financial objectives in planning and periodic reporting
- Lack of defined metrics for measuring progress for non-financial objectives

Both of these two weaknesses were addressed by the advent of the Balanced Scorecard. However, there came new challenges to overcome.

Setting up the plan

Organizations encounter two hurdles to overcome when setting up the process for tracking execution of their strategic plan:

- ▶ Aligning objectives and initiatives among individuals is exacting and time-consuming: Owners of objectives find that they must communicate (in many cases, in pre-arranged or *ad hoc* meetings) with each individual who will carry out activities supporting the objective, asking them to accept responsibility for supporting objectives and programs.
- ▶ Performance indicators and metrics are often inconsistent with the organization's strategy.

Managing plan execution

The time span for execution of a plan is longer than its creation, and so managers naturally encounter more gaps:

- ▶ The supporting administrative task can be huge: The introduction of far more non-financial objectives into an organizations plans created a sizable administrative task.

Note: Most organizations follow a monthly cycle for reviewing financial results and checking progress on non-financial objectives. The result has been, for some large organizations, a full-time effort by a dedicated staff, who obtain the progress reports from owners of objectives, interpret the reports to conform to a common format, and distribute the results in time for the review meetings.

- ▶ Everyday events disconnect managers from their plans: Almost every event in a plan occurs between monthly review meetings, and so either managers wait to learn about successful completion (or non-completion) or they ask for ad hoc interim reports outside the monthly reporting cycle.

Note: Heavy reliance on monthly reporting cycles can incur a potentially high opportunity cost: waiting an average of two weeks to learn about plan outcomes will likely delay corrective action, while dependence on ad hoc reports undercuts the value of monthly reviews.

- ▶ Monitoring external events affecting plan execution is both fragmentary and expensive: Without linking the business data flowing into the organization to specific objectives and initiatives, some external events can be overlooked, even by managers who maintain a private data-gathering process.
- ▶ Determining target shortfalls is an ad hoc analytic task: Most managers know well the search for causes of progress shortfalls, by "drilling down" to the possible underlying cause and calculating the contribution of each to the shortfall. There is, however, usually very little time between the arrival of supporting results and the deadline for review reports and meetings, so managers and their supporting staffs have to set aside other activities in preparation for their monthly reports.

Note: To minimize their exposure to pre-mature disclosure of quarterly financial results, many companies follow a very tight schedule for distributing, reviewing, and releasing financial, for example:

- ▶ Day preceding release date: Corporate and business unit results distributed internally. Business unit managers research variances and summarize to CEO for possible incorporation in press release the following day.
- ▶ Release date, morning: Board meeting to review results.
- ▶ Release date, afternoon: Public release of quarterly results.

Naturally, a wide range of procedures and people are created to help business unit managers anticipate their own units results, when distributed internally.

Important: We should not be surprised that syndicated research finds that companies typically realize only some 60% of their strategies potential value due to breakdowns in planning and execution, as described in this *Harvard Business Review* article:

[http://harvardbusinessonline.hbsp.harvard.edu/hbsa/en/hbsaLogin.jhtml?urlparam\\$KNRXE2ULYRiR52NiWJYH5SF?ID=R0507E&path=arc&pubDate=July2005&_requestid=24637](http://harvardbusinessonline.hbsp.harvard.edu/hbsa/en/hbsaLogin.jhtml?urlparam$KNRXE2ULYRiR52NiWJYH5SF?ID=R0507E&path=arc&pubDate=July2005&_requestid=24637)

1.3.4 Technology available for the job

Organizations have realized that automation is a key part of meeting the challenges above. Specifically, an effective system should be able to perform several functions, among them:

- ▶ Facilitate cascading, to enable the collaboration among individuals to create the structure of objectives and action programs necessary to achieve the organization's goals
- ▶ Assignment of individual responsibility, so that each objective and action program has an owner
- ▶ Drill-down facility, for immediate tracking of the contributors to meeting (or missing) targets
- ▶ At-a-glance status indicators: user interface graphical presentation
- ▶ Links to external sources, for data input from any relevant (and permitted) source
- ▶ History tracking, by easily-accessible audit trails of changes and reports for any objective or action program

IBM Workplace for Business Strategy Execution provides the intuitive tools and features designed to meet these challenges so that your company stays focused on the business unit strategy throughout the year.

The balance of this Redpaper describes how you can apply the product's features to help manage the execution of your strategy, without necessarily mounting a massive conversion project. The aforementioned two organization scenario will illustrate the road to follow.

Tip: Workplace for Business Strategy Execution can be introduced department-by-department or by geographic region rather than by a large conversion project, in which all units adopt the new system simultaneously, so long as the strategic objectives have been determined and which business unit will be contributing.

In the next section, we outline the strategic plan framework as seen from the Workplace for Business Strategy Execution user's viewpoint.

1.4 The Framework for Workplace for Business Strategy Execution

Workplace for Business Strategy Execution provides for objectives and supporting *initiatives* (equivalent to action steps or programs in other frameworks), whose interrelationships are established by the objectives' owners. Objectives can support one or more other objectives. Initiatives support objectives and can support other initiatives.

Users assign each of their objectives to one of the perspectives in Workplace for Business Strategy Execution. The default perspectives are similar to those introduced by the Balanced Scorecard. However, the perspective names can be modified in Workplace for Business Strategy Execution to match those already chosen by an organization. Since there is no limit to their number, perspectives could be customized to act as an index to another structure, such as company, organization, or corporate goals.

Note: Key terms in Workplace for Business Strategy Execution can be changed to conform to terminology developed by a user organization. The only requirement is that individuals using the same installation of Workplace for Business Strategy Execution agree on the same set of terms and their definitions. See Chapter 8, “Workplace for Business Strategy Execution system administration” on page 147 for the Administrator’s role in managing the terminology in your installation of Workplace for Business Strategy Execution.

1.4.1 Scorecards

The primary tool provided with Workplace for Business Strategy Execution is the scorecard (see Figure 1-2). Conceptually, the scorecard is the interface where strategic objectives are created and monitored. In practice, employees maintain their own scorecards. An individual scorecard lists strategic objectives for which the employee assumes responsibility. Employees can push objectives to others so that the right people are linked to the activities for the objectives.

| Scorecard for Judith Batista | | | | | | |
|-------------------------------------------------------|--------|------------------|----------|----------|--------|--------------|
| Scorecard state: Draft | | | | | | |
| Display results for: This year | | | | | | |
| Objective | Status | Milestone Target | Actual | Variance | Change | Final Target |
| Customer | | | | | | |
| Raise number of new memberships | 🚩 | 420.55 | 417 | -0.84% | 0.24% | 464 |
| Finance | | | | | | |
| Increase program revenues | 🟢 | \$72.37 | \$71.6 K | 6.02% | 0.14% | \$575 K |
| Maintain Spending Targets | 🟢 | \$1.1 M | \$400 K | -63.64% | | \$3.41 M |
| Obtain new corporate sponsorships | 🟢 | \$2.52 K | \$8 K | 17.68% | 0% | \$200 K |
| Internal Business Process | | | | | | |
| Increase partnerships to increase exhibit exchange | 🚩 | 1 | 0 | -100% | 0% | 1 |
| Initiate New Programs | 🚩 | 23.18% | 21% | -9.4% | 5% | 100% |
| Learning and Growth | | | | | | |
| Design and introduce new program to reward volunteers | 🚩 | 100% | 79% | -21% | 1.28% | 100% |
| Increase number of employees | 🚩 | 2.17 | 35 | 2.9% | 40% | 64.46 |

[Status Legend](#)

Figure 1-2 The Workplace for Business Strategy Execution scorecard

1.4.2 Status maps

Status maps display, for any objective, the supporting objectives and initiatives, in a familiar tree format (see Figure 1-3). The current status of each objective and initiative is color-coded, along with the latest actual values, to enable quick identification of the source of any progress shortfall.

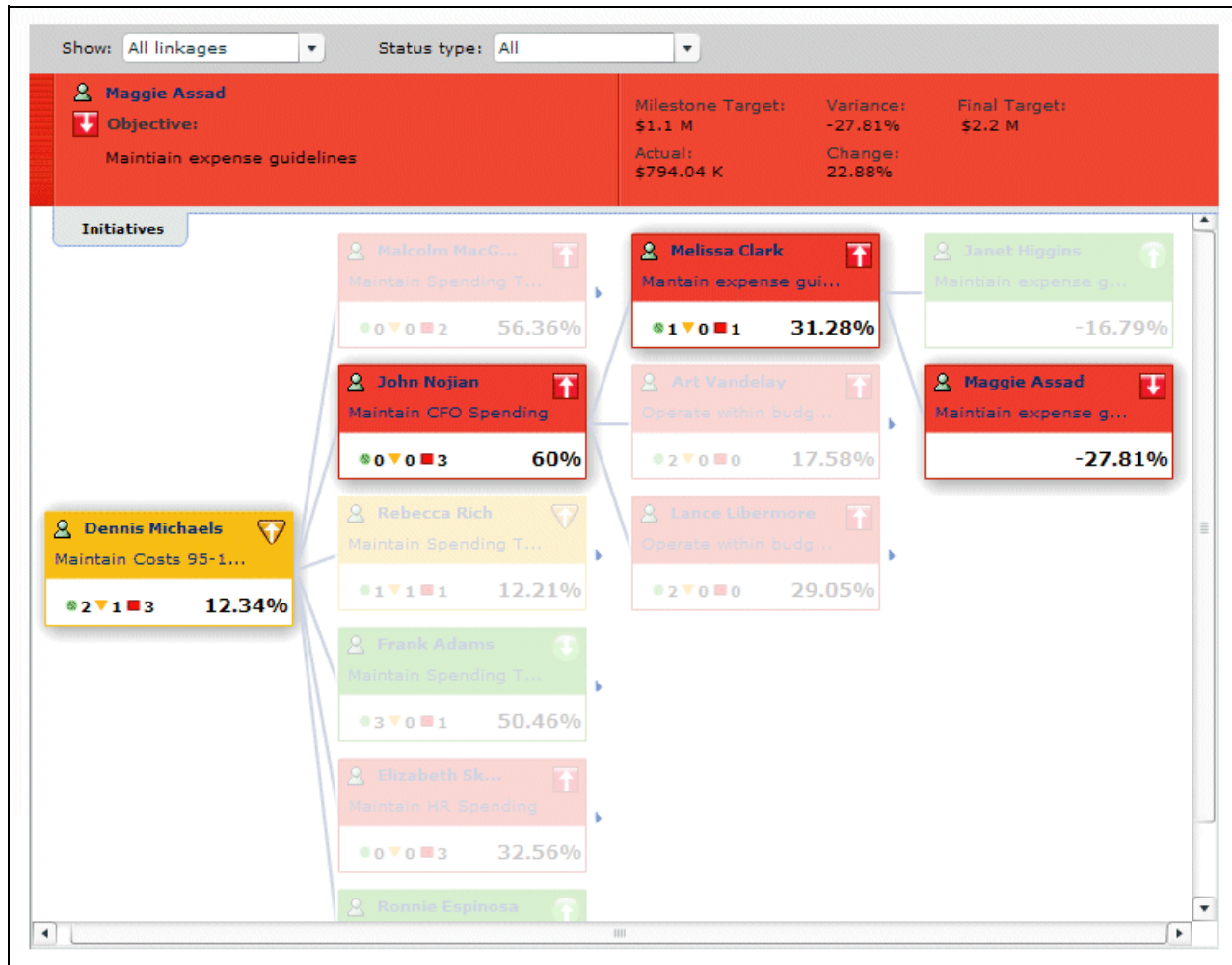


Figure 1-3 The Workplace for Business Strategy Execution Status Map

1.4.3 Dashboards

A dashboard is a collection of portlets containing information and applications that, when used together, convey real-time information about business data (see Figure 1-4 on page 12). For example, a sales dashboard may contain client data while an executive dashboard may contain high level financial information. These portlets can take the form of graphs, charts, RSS feeds, business portlets, and more.

A dashboard can be customized for any individual and might present external information potentially affecting achievement of the individual's objectives, for example:

- ▶ New regulations or legislation
- ▶ Competitors' announcements
- ▶ Key clients' news
- ▶ Product technology developments

Portlets on a dashboard can come from any source, including the IBM Solutions Catalog, software companies who have portlet interfaces to their applications, and even custom-built portlets. See Chapter 6, “Dashboard” on page 103 for more information about where portlets can be found and building custom portlets using the IBM Workplace Dashboard Framework, another IBM product that is used for developing portlets and creating dashboards.

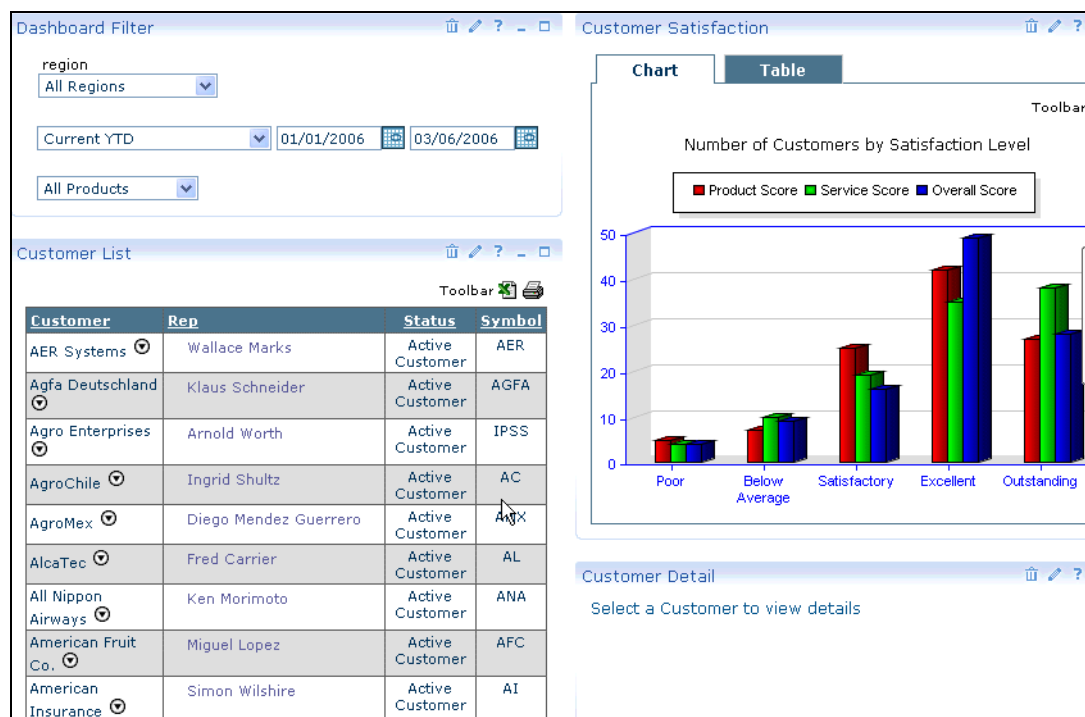


Figure 1-4 A sample sales dashboard, built using the IBM Workplace Dashboard Framework

1.4.4 Creating efficiencies at ITSO Insurance and ITSO Science Museum

Earlier in this chapter, we introduced two organizations who faced management challenges and were considering using Workplace for Business Strategy Execution to help alleviate their issues. Let us now take a look at how the two companies will overcome these issues with Workplace for Business Strategy Execution.

ITSO Insurance, an enterprise insurance company

Let us remind ourselves of the two challenges ITSO Insurance faces:

- ▶ Functional organization structure: Responsibility is shared by two or more functions, which can lead to weak management if responsibilities are not carefully defined.
- ▶ Decentralized decision-making: A key challenge for managing the network of branches is ensuring that each branch correctly interprets and applies, for its local environment, objectives and initiatives set at the home office.

In order to overcome these challenges, ITSO Insurance is going to implement Workplace for Business Strategy Execution. To help break down the siloed functional areas, they will be able to cascade objectives throughout the company, aligning their goals to the organization's strategy. They will also be able to visualize the status of these objectives to see how each impacts the overall goal. While decision-making occurs in a decentralized way, the objectives that are cascaded will provide clearly set targets that will provide communication on what the expectations are. Using initiatives, the company will be able to create plans that can be cascaded.

ITSO Science Museum, a non-profit organization

The ITSO Science Museum is constantly changing its programs due to fluctuations in funding. Here are some of their challenges as discussed earlier:

- ▶ Lacking a way to rapidly respond to the changing priorities caused by the unpredictability of major grant and donations.
- ▶ Inability to visualize the overall funding levels that the organization has to work with at any given moment and what funding may be expected to arrive in the near term.

It is important for ITSO Science Museum to know exactly how much funding they have at a given time, as that number is highly variable. Using Workplace for Business Strategy Execution, they will be able to identify the amount of funding they have quickly in the scorecard and use initiatives to plan new programs related to that amount. They will also use the Status Map to see costs across all parts of their organization.

1.5 Some resources

The following, as a quick review, is a glossary for terms discussed in this chapter. Then we have listed some references for readers who wish to delve further into the subject of Balanced Scorecards and strategy execution. Both lists are included in larger appendixes, with similar names, at the end of this Redpaper.

1.5.1 Key Terms

Scorecard: A scorecard is a management tool that enables organizations to clarify their vision and strategy and translate them into specific goals, or objectives. With the scorecard, organizations can track their performance in achieving the strategy. When fully deployed, the scorecard transforms strategic planning from an academic exercise to an integral part of managing and evaluating an enterprise's objectives. Workplace for Business Strategy Execution maintains one scorecard for each user.

Dashboard: Dashboards integrate data from a variety of sources and provide a unified display of relevant and in-context information for informed decision making. They contain portlets that pertain to specific objectives to encourage and facilitate action.

Objectives: Objectives are specific goals to achieve a strategy. They have a target level of anticipated performance that may be expressed as a percentage, number, currency, or boolean (yes/no). Objectives may also have milestones that divide the time period into some number of smaller periods, indicating milestone targets.

Initiative: Initiatives are action plans or action steps that are in place to help achieve an objective or improve its performance.

Linkages: An objective that depends on other objectives is said to be "linked". Linkages are directional, meaning one objective is the target of the link from the other objective. Linkages may be one-to-one or many-to-one.

Actual Value: The most current data that represents the concrete performance of an objective. Objectives will have actual values throughout the objective's time period. The data may be manually entered, programmatically entered by retrieval from an external data source, or computationally "rolled up" from linked objectives.

For a full list of important terms, see the "Glossary" on page 207.

1.5.2 Useful References

This chapter briefly reviews some strategic plan concepts and practices, including those associated with the Balanced Scorecard framework. However, it is not intended to be a full discussion of the subject. For more background on the Balanced Scorecard and other strategic plan concepts, some of the following references might be useful:

The Balanced Scorecard: Translating Strategy into Action, by Kaplan et al

The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment, Kaplan et al

Strategy Maps: Converting Intangible Assets into Tangible Outcomes, by Kaplan et al

Balanced Scorecard Diagnostics: Maintaining Maximum Performance, by Niven



IBM Workplace for Business Strategy Execution Product Overview

This chapter will provide an overview of the IBM Workplace for Business Strategy Execution product, including descriptions of scorecards and dashboards. This chapter will also present the value of using Workplace for Business Strategy Execution in an organization.

In this chapter, the following topics are discussed:

- ▶ Product overview
- ▶ Scorecard basics
- ▶ Dashboard basics
- ▶ The benefits of using Workplace for Business Strategy Execution

2.1 Product overview

Workplace for Business Strategy Execution provides the toolset needed to enable organizations to execute a corporate strategy. For a strategy to be effective, all players must understand the organization's strategy and the goals it will accomplish, as well as recognize how their role in the organization contributes to the strategy. Every member of an organization should pursue objectives that are consistent with this strategy and continually review the performance of these objectives so that areas which are not performing can be addressed. A key proponent to identifying the areas that need attention is to understand how an objective is *dependent* on the success of others and also how the objective *contributes* to the success of others. By understanding these dependencies, an organization can take action to facilitate performance improvements.

With Workplace for Business Strategy Execution, members of an organization are able to monitor their own objectives, understand how their particular objectives relate to others and to the overall strategy, effectively mitigate situations, and take action to recover from or prompt change. Through scorecards used to track corporate objectives and dashboards used to surface relevant information, Workplace for Business Strategy Execution helps corporations more effectively execute and monitor their strategy.

Important: Workplace for Business Strategy Execution is not software to help you create your business strategy. Instead, it is designed to ensure that your strategy succeeds.

We recommend that you begin an initial deployment with a product overview for each member of the team participating in the deployment. Understanding the features and functions of the product will help set the stage for the rest of the deployment. Use this chapter as a guide on the features of the product and how they can be useful to your organization.

Note: Workplace for Business Strategy Execution Version 1.0 is installed with sample data. This sample data is useful for trying out the product features and creating examples. The sample data includes a fictional organization with users and scorecards, and you can use it to show members of your teams how to use the product. It can be removed by an Administrator.

2.1.1 The Workplace for Business Strategy Execution scorecard

The Workplace for Business Strategy Execution scorecard is a tool used to establish and track objectives and the supporting initiatives necessary to fulfill objectives from both a top-down and bottom-up point of view. The scorecard is unique to a person, displaying the set of objectives, targets, status, and actual values an individual aims to achieve, as shown in Figure 2-1 on page 17.

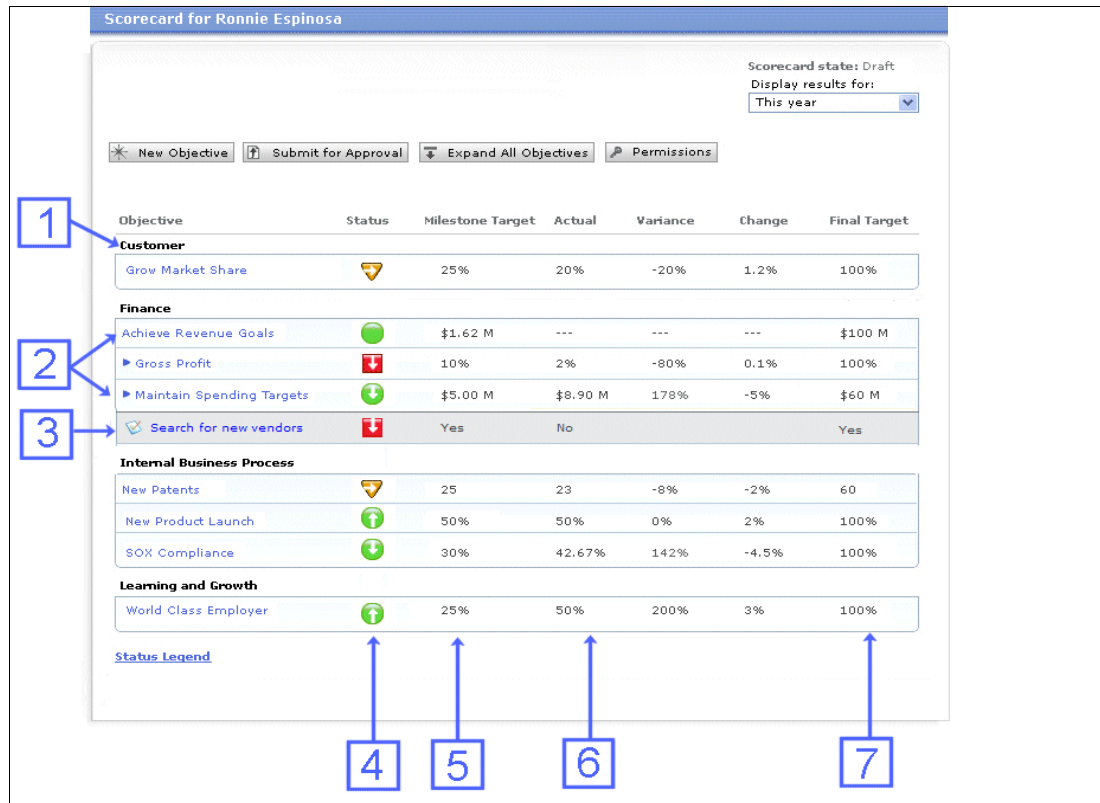


Figure 2-1 The Workplace for Business Strategy Execution scorecard with numbered highlights

Highlights of the scorecard view

1. Perspectives are used to group the objectives into common, cross-company categories.
2. Objectives are the goals an individual is aiming to achieve. Often, these objectives have dependencies on other objectives.
3. Initiatives are action plans or action steps toward achieving an objective.
4. Combined Status and Trend shows how the objective is performing by displaying a red (not on target), yellow (slightly off-target), or green (on target) status indicator. There is also a trend arrow indicating if the objective is improving (up), declining (down), or showing little movement (horizontal). The status is based on the target value as compared to the actual value.
5. Milestone Target is the next target an objective is aimed to reach. Milestones may be as frequent as daily or as infrequent as yearly.
6. Actual Values are the figures associated to the actual performance of an objective. They may come from a variety of different sources, like a sales system or even a spreadsheet.
7. Final Target is the target goal for the objective. It shows where the objective is expected to reach.

With the Workplace for Business Strategy Execution scorecard, organizations can define strategies to meet corporate goals, align these strategies by creating linked objectives throughout the organization, and quickly identify the cause of low performing objectives.

Showing dependencies in the Status Map

The Workplace for Business Strategy Execution scorecard provides the ability to cascade and link objectives throughout an organization. Objectives may be dependent on other objectives to accomplish the target, and these dependencies can be viewed through a visualization known as the Status Map, as shown in Figure 2-2.

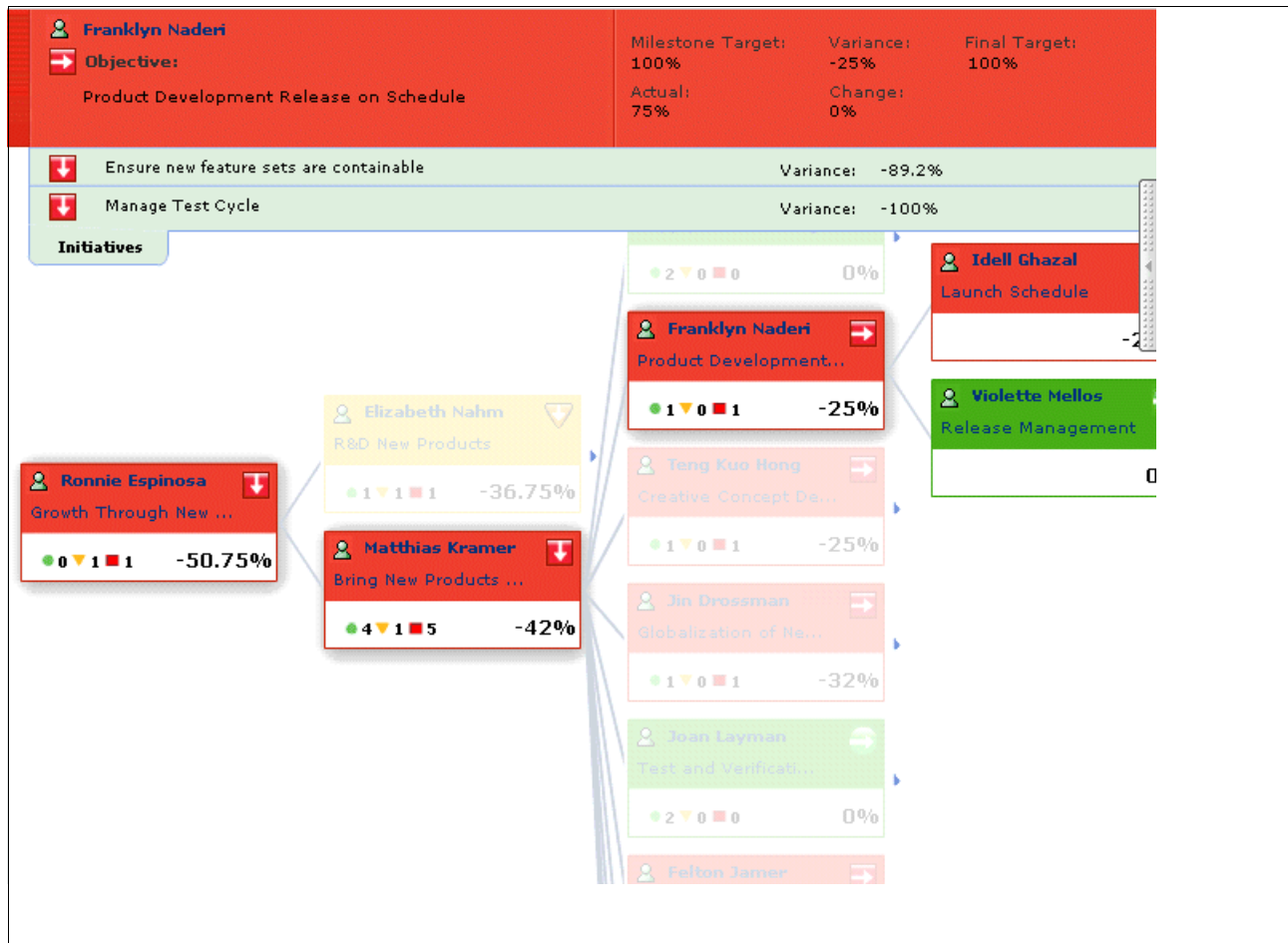


Figure 2-2 The Status Map shows the dependencies of objectives and associated initiatives

The Status Map can be used to drill down on an objective and identify the root cause of low performing objectives in the organization. This map can be used to show dependencies objectives have on each other as well as show the initiatives that are aimed at improving the performance of the objective.

Rolling up data for an overall view

The map in Figure 2-2 shows data that is rolling up from several parts of the organization to represent the overall status of the objective. By rolling up data from linkages, objectives represent the collective performance of those objectives which it is dependent on. Workplace for Business Strategy Execution supports a multi-type rollup, that means different types of data can be aggregated to give an overall status. For example, a client satisfaction score in the form of a percent can be combined with a product sales figure in the form of dollars to show an overall view of client relationships.

The Navigator, Search, and Alerts components

In the upper left hand column of the Workplace for Business Strategy Execution window is the Navigator, which allows a person to find people in the company based on an organization chart, a department chart, a geography, or any other hierarchy needed to display in the Navigator. By selecting a name in the listing, you are taken to the scorecard associated to that person or department. Below the Navigator is a search component, which allows you to search for people in the company and view information about them or go directly to their scorecard. Lastly, below the search box is an alerts component that displays targeted alerts to the end user whenever modifications have been made to their scorecard, objectives, or initiatives.

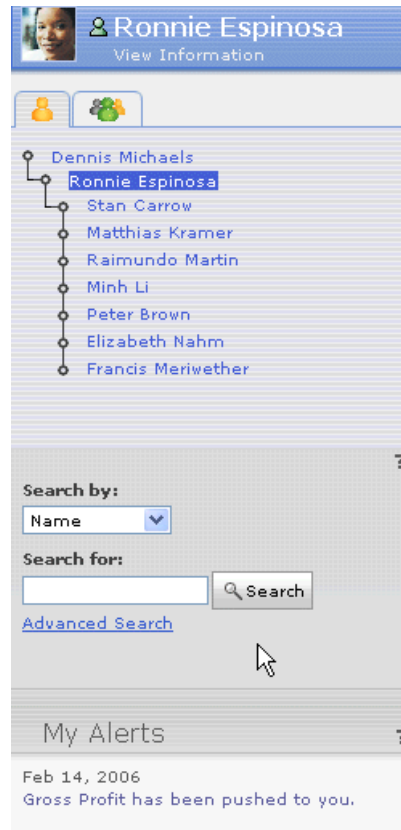


Figure 2-3 The Navigator, Search, and Alerts Components

2.1.2 Workplace for Business Strategy Execution dashboards

In concert with the scorecard, Workplace for Business Strategy Execution dashboards turn strategic alignment and accountability into action. Dashboards enable decision makers to rapidly gain insight, effectively evaluate a situation, and quickly respond. By integrating data from a variety of sources, dashboards provide a unified display of relevant and in-context information for informed decision making. To encourage and facilitate action, Workplace for Business Strategy Execution dashboards are directly linked to objectives and initiatives in the scorecard.

Workplace for Business Strategy Execution dashboards integrate information that is relevant and in-context to specific business users. A dashboard can show information specific to these users, including:

- ▶ Business Situation Alerts: Alert objective owners of situations that require business response.
- ▶ Business Data and Analytics: Employ metrics to uncover root causes and make informed decisions.
- ▶ Collaboration Services: Work with teams to resolve situations.
- ▶ Prompted Actions: Select an operation to adapt performance.
- ▶ Monitored Actions: Track status of actions and projects.
- ▶ Market News: Gather external information and events affecting performance.
- ▶ Reports and Analyses: Understand real time performance against historical trends.
- ▶ Monitored Processes: Align operational metrics with critical business processes.
- ▶ New and Existing Applications: Enable a cross- enterprise view that focuses on a specific business need.

Figure 2-4 gives an example of a dashboard.

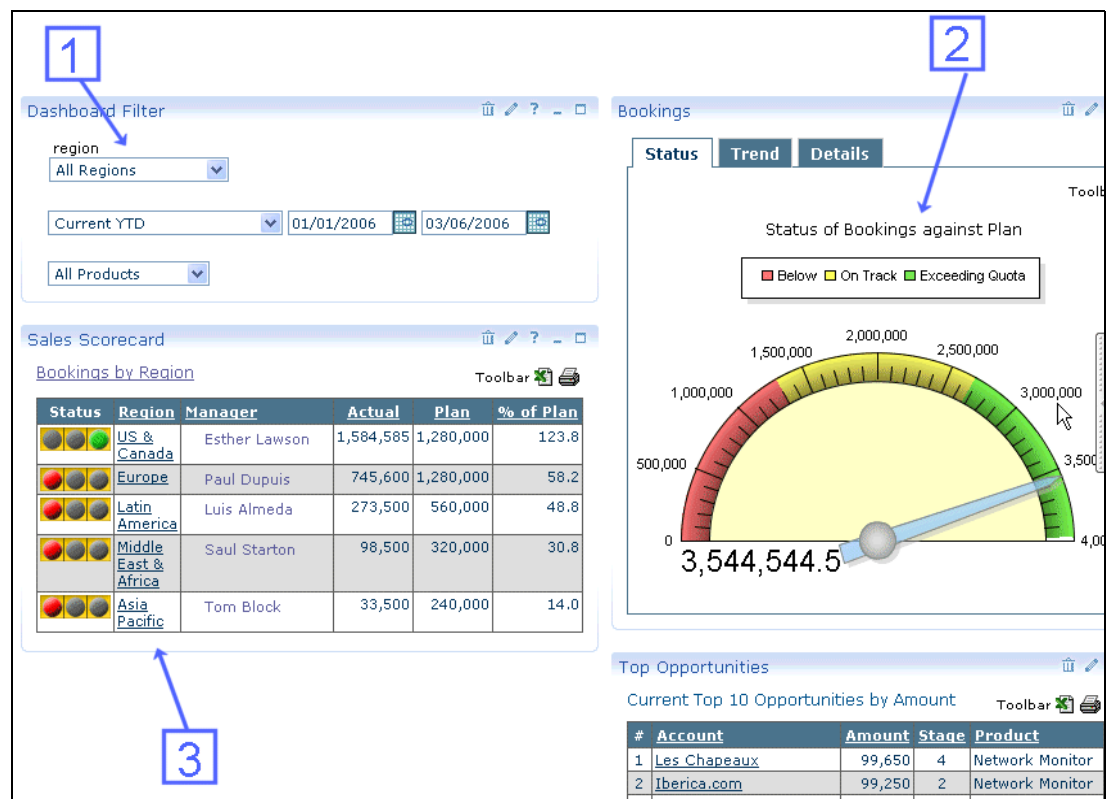


Figure 2-4 An example of a dashboard displaying sales information; this dashboard was built using the IBM Workplace Dashboard Framework

Dashboards display a collection of portlets that are related to a given objective. They can be pre-populated by an administrator, created by an end user, or modified by an end user.

Here are some examples of what portlets can display, as shown in Figure 2-4 on page 20:

1. Filters: Manipulate queries to view a different set of information across pages.
2. Tables, Graphs and Charts: Display a variety of views of data.
3. Lists: Summarize and present information that can be drilled-down.

Other types of portlets not shown include:

- ▶ Diagrams and Process Maps: Show global maps or process flows.
- ▶ Tools: Visualize data cubes and use search tools display query results.

Dashboards are pages containing portlets. There are four portlets shown in Figure 2-4 on page 20. Portlets are used to display information, filter information, or take action. The portlets shown in Figure 2-4 on page 20 were built with the IBM Workplace Dashboard Framework. You can learn more about the Workplace Dashboard Framework in Chapter 6, “Dashboard” on page 103.

2.2 Benefits of using Workplace for Business Strategy Execution

Workplace for Business Strategy Execution assists leaders in providing the environment for all people and business units to more easily execute a successful strategy. Complex and siloed organizations, processes, applications, and infrastructure can make it difficult for business decision makers to effectively manage the communication and execution of the corporate strategy. Workplace for Business Strategy Execution meets this challenge by enabling organizations to:

- ▶ Align performance to strategy
- ▶ Help employees understand how their role relates to the overall corporate strategy
- ▶ Deliver in-context information through customized scorecards and dashboards
- ▶ Better communicate strategy and priorities
- ▶ Show how individuals and business units impact each other
- ▶ Provide tools to manage exceptions quickly

Through a set of integrated scorecards and dashboards, Workplace for Business Strategy Execution provides the foundation for organizations to execute strategy.

2.2.1 Organizational agility

An organization that uses Workplace for Business Strategy Execution can rapidly respond to changing conditions. New corporate strategies can be deployed across the organization in a timely way. All members of the organization can be aligned with the strategy, be accountable for their contribution, and have a schedule of actionable activities to accomplish goals.

Organizational agility is facilitated by:

- ▶ Linked objectives
- ▶ The ability to assign ownership to objectives and initiatives
- ▶ Integration with the corporate directory
- ▶ The ability to navigate linkages by organization, department, project, or role
- ▶ Roll-up of metrics

- ▶ Detailed visualization of corporate strategy showing a matrix of dependent, interconnected objectives, the status of those objectives, and the impact they have on each other

2.2.2 Early warning of performance problems

Organizations can gain visibility to key performance indicators and dependencies across organizational boundaries. It is important to know when the poor performance of a downstream objective may impact an entire strategy. Likewise, it is important to know when a schedule impact in one department may affect a revenue impact in another, even when they use different metrics for measuring performance. With Workplace for Business Strategy Execution, organizations can address problems when they emerge and keep their strategy on target and on schedule.

Early warning of performance problems is facilitated by:

- ▶ Linked objectives
- ▶ Roll-up of metrics
- ▶ Multi-type roll-up
- ▶ Scorecard to dashboard integration

2.2.3 Understand the impacts of change

You can visualize the impact, risk and cost of a change in performance or a change in strategy before committing to it. You can also clearly understand the downstream impact of change and evaluate if that change can be contained in the current strategy or determine if the strategy needs to be modified.

Understanding the impact of change is facilitated by:

- ▶ Linked objectives
- ▶ Roll-up of metrics
- ▶ Multi-type roll-up
- ▶ Attachments

2.2.4 Understand the full context of business data

With Workplace for Business Strategy Execution, you can move beyond simple charts and traffic lights of status and visualize business data across traditional information silos knowing who is accountable for each metric, what they depend on to achieve it, and their contribution to the business strategy. As everyone can see the same data, you share one version of the truth. You can navigate through business data by the context of its impact: navigate metrics by project, role, department or individual.

Understanding the full context of business data is facilitated by:

- ▶ Roll-up of metrics
- ▶ Scorecard - dashboard integration

2.2.5 Repeatable best practices

You can leverage organizational perspectives, templated scorecards, and metrics, along with role based dashboards, to deploy repeatable best practices using a management framework or creating your own.

Repeatable best practices are facilitated by:

- ▶ Organizational perspectives
- ▶ Objectives and initiatives



Getting started

This chapter will cover business and technical considerations for Workplace for Business Strategy Execution. Since Workplace for Business Strategy Execution is a tool for helping companies more effectively execute their strategy, some thought needs to be given to what measurable objectives will be used to achieve the strategy.

Some users will find that their organization has a vast array of metrics and reports generated from various data, but no metrics specifically tied to their business strategy. Others might find they have very clearly defined business objectives but perhaps not the metrics and reports they need to measure how well those objectives are being implemented. Using our two organization scenario to illustrate, the following chapter will walk through tips on successful initial planning.

In this chapter, we will cover the following topics:

- ▶ What it takes to get started
- ▶ Available editions of Workplace for Business Strategy Execution
- ▶ Identifying key objectives to track
- ▶ Identifying data sources to use
- ▶ Scenarios for deployment

3.1 What it takes to get started

Before beginning a new deployment of Workplace for Business Strategy Execution in your organization, you will need to consider several aspects of this tool, including people, data, and resources that will be involved. Below is a series of questions that you will need to address in preparation for a deployment. The following questions are discussed in this chapter:

- ▶ Which edition of Workplace for Business Strategy Execution are you going to use?
- ▶ Who will be involved in the deployment?
- ▶ What are the objectives and initiatives that need to be tracked?
- ▶ How is this information being tracked currently?
- ▶ Where are the data sources used for this information?
- ▶ What dashboard views will be needed in context to which objectives?

3.1.1 Choosing an edition of Workplace for Business Strategy Execution

Workplace for Business Strategy Execution Version 1.0 comes in two editions. You can install the *Team Edition* with IBM Workplace Services Express, or you can install the *Enterprise Edition* on IBM WebSphere Portal Extend Version 5.1.0.1 or higher. Deciding which variety to install will depend on your expected usage.

- ▶ Workplace for Business Strategy Execution Version 1.0 Team Edition is easier and quicker to install and begin using, but will only function well for low levels of usage and deployments. This would be more suitable for the non-profit organization we introduced in Chapter 1, ITSO Science Museum.
- ▶ Workplace for Business Strategy Execution Version 1.0 Enterprise Edition, although more complex to set up, will cater to heavier traffic. This would be the right choice for a large organization, like ITSO Insurance.

Attention: Throughout this Redpaper, you may see references to Workplace Services Express and WebSphere Portal. Please keep in mind:

- ▶ Workplace for Business Strategy Execution version 1.0 Team Edition is built on Workplace Services Express. Workplace Services Express is based on Portal 5.0.2.2.
- ▶ Workplace or Business Strategy Execution version 1.0 Enterprise Edition is built on Portal 5.1.

The majority of the screen captures used in the Redpaper are based on the Team Edition. The functionality we discuss in this Redpaper is available in the Enterprise Edition as well, and often uses the same steps and interfaces.

If you plan to have more than 100 people using Workplace for Business Strategy Execution, Enterprise Edition should be your installation of choice.

Tip: Full installation instructions and technical requirements for both varieties of Workplace for Business Strategy Execution can be found in the product information center at:

<http://www-128.ibm.com/developerworks/workplace/documentation/businessstrategy/>

More information can be obtained in Appendix A, “Looking forward” on page 195, but it is planned at some point in the future to have a mechanism for exporting all Workplace for Business Strategy Execution data in a format that could then be imported into a clean install of Workplace for Business Strategy Execution. This should allow for an organization that has

performed a proof of concept on the Workplace Services Express Team Edition to move to the more robust WebSphere Portal Enterprise Edition. However, it would still be recommended that you analyze your requirements and select the appropriate edition right from the outset.

Important: If you plan to use an existing LDAP user registry, you should perform the appropriate configuration steps as soon after installation as possible. Note that it is possible to enable LDAP at a later point; however, users stored in the default user profile repository cannot be transferred.

Understanding how Workplace for Business Strategy Execution uses LDAP

Workplace for Business Strategy Execution uses Lightweight Directory Access Protocol (LDAP) as the primary member directory, as LDAP builds user lists in a hierarchical structure. When Workplace Services Express or WebSphere Portal is installed, it will use Member Manager as the user registry unless you transfer security to a LDAP server. LDAP is the preferred directory to use with Workplace for Business Strategy Execution, as the views and permissions rely on hierarchical structures, as defined in the LDAP. If your organization uses an LDAP that does not define an organizational hierarchy, you will experience the drawbacks as described below.

Drawbacks of using a non-hierarchical structure

By default, both editions of Workplace for Business Strategy Execution will allow members of your user group to create their own user accounts using Member Manager, but there are drawbacks to doing this. You may still need to consider this option if:

- ▶ Your user group is very small and wants to manually create its own accounts.
- ▶ An LDAP has not already been established for your organization's computer environment.
- ▶ The LDAP in your computer environment does not have a defined hierarchy.

Workplace for Business Strategy Execution can support user accounts that exist outside the LDAP and organizations that do not use an LDAP. You can create a new user profile, for example, from the "Sign Up" screen. However, the profile will not by default be able to link to other users in the product. Each scorecard owner needs to grant permission to other specific users that have been manually added through the Scorecard Permissions settings, for those users to view that owner's scorecard.

One of the more prominent places in Workplace for Business Strategy Execution where your LDAP schema will appear is in the Navigator Pane (see Figure 3-1). If you choose this method for creating new users, note that the Navigator will not display the hierarchy and will only show the logged in user name. You will still be able to search for users and navigate via the Status Map.

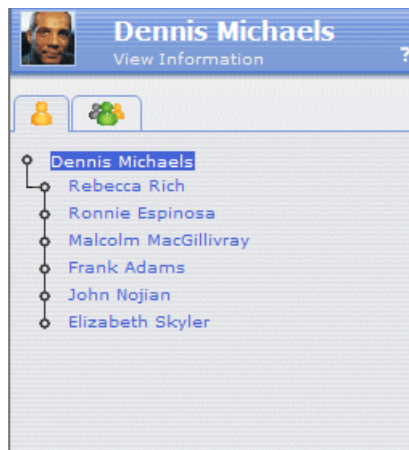


Figure 3-1 The Navigator Pane

The Navigator is shown on the left side of the scorecard screen and displays a view of the organization structure from the perspective of a user or a custom hierarchy, such as by function or geography.

The scorecard displayed is updated based on the hierarchy tree selection. The initial selection in the hierarchy tree is the current portlet user. When you navigate to another individual in the hierarchy tree, that person's scorecard appears in your window.

There are two tabs at the top of the Navigator pane: clicking the tab on the left (a one-person icon) will display individuals' names; clicking the tab on the right (a group icon) displays names of departments or companies in the organization. If you want to create custom hierarchies in the Navigator pane, your user information and attributes must be stored in an LDAP directory, and that LDAP server must be configured appropriately with the underlying portal software. Up to five custom hierarchies can be created, each accessed by a new tab at the top of the Navigator pane.

There are a few considerations to keep in mind;

- ▶ You will need to un-install the sample data that comes with Workplace for Business Strategy Execution, so take a good look and ensure you have a good idea of what your own data will look like. Refer to the sections below on how to prepare your own data for entry to the product.
- ▶ If the site is configured to use an LDAP directory, the user access control policies for IBM Workplace for Business Strategy Execution are dependent on how user information and attributes are set up in the LDAP directory.
- ▶ You can install IBM Workplace for Business Strategy Execution on an IBM WebSphere Portal instance that is already configured to use an LDAP server. For more information, refer to the IBM WebSphere Portal Information Center at:

http://publib.boulder.ibm.com/infocenter/wpdoc/v510/index.jsp?topic=/com.ibm.wp.ent.doc/wpf/intr_ldap.html

Important: If you plan to use an existing LDAP user registry, you should perform the appropriate configuration steps as soon after installation as possible. Note that it is possible to enable LDAP at a later point; however, users stored in the default user profile repository cannot be transferred.

- ▶ You can install IBM Workplace for Business Strategy Execution with IBM Workplace Services Express, and then configure the site to use an LDAP server. The steps for doing that are provided in the IBM Workplace Services Express Information Center at http://publib.boulder.ibm.com/pvc/wse/200/smb/en/InfoCenter/wpf/intr_ldap.html

For more specific technical information about how to map Workplace for Business Strategy Execution to your LDAP directory, please refer to Chapter 8, “Workplace for Business Strategy Execution system administration” on page 147.

3.1.2 Choosing your deployment's Pilot Team

With Workplace for Business Strategy Execution, it is easier to implement starting with a small group to make up your Pilot Team. From there, the objectives can grow and cascade throughout the organization. The best Pilot Teams are the ones that already have a clear idea of what information they want to view in the product.

Decide who is going to be involved with the deployment from the start. There are at least three roles that you will want to identify:

- ▶ **Scorecard Owners:** You may want to choose several scorecard owners to begin with. These will be the people who have their own scorecard in the system.
- ▶ **Business Analysts/Scorecard Administrators.** Each scorecard owner may also want to identify a person who works closely with them, possibly a business analyst, to act as a scorecard administrator. These will be the people who assist in the creation or maintenance of a scorecard. They work with the Owner to help identify key business information to include as well as set up the scorecards.
- ▶ **System Administrator(s).** There will need to be an Administrator(s) for Workplace for Business Strategy Execution, who may also be the person installing the product.

Once you identify your team, it is helpful to begin by walking through some of the sample data in the product to understand how it is used. Getting a sense of how the product works will help in identifying what objectives your own team may have, as shown in Figure 3-2, for example. For more complete information about all the various components that make up the scorecard view, refer to Chapter 2, “IBM Workplace for Business Strategy Execution Product Overview” on page 15 for the Workplace for Business Strategy Execution Overview and Chapter 5, “Creating objectives, setting targets, and tracking progress” on page 63, for the scorecards.

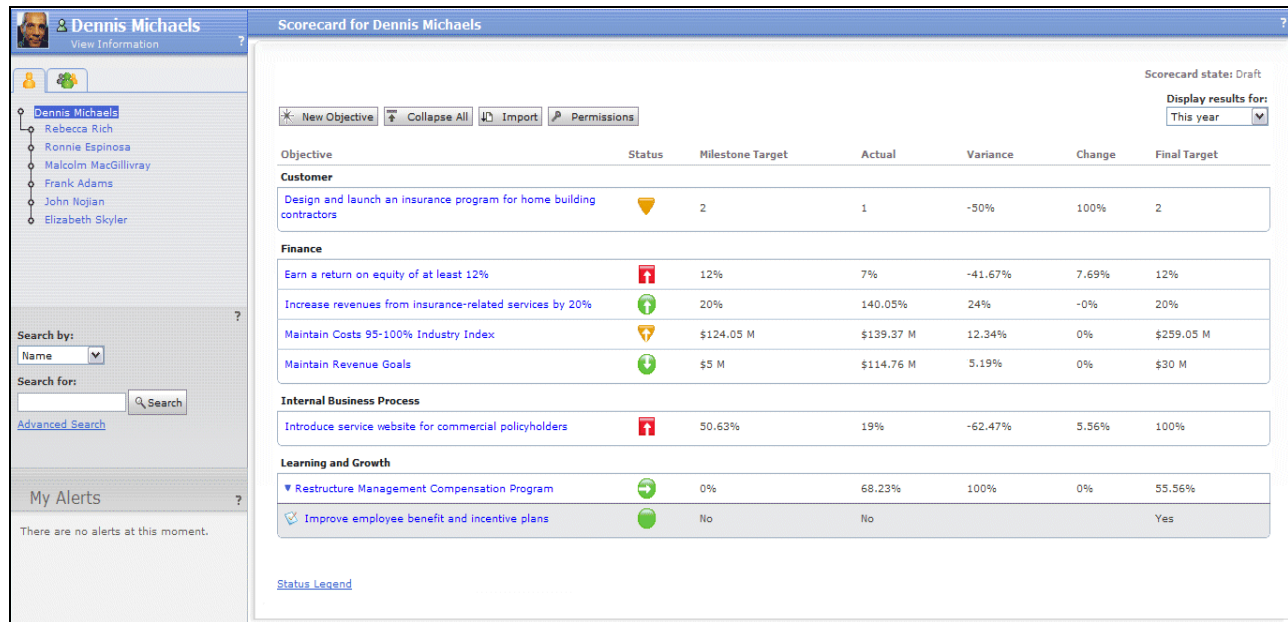


Figure 3-2 An ITSO Insurance scorecard with objectives

3.1.3 Selecting the objectives to track

The next phase is to have your Deployment Team’s scorecard owners articulate the objectives and initiatives they will want to view in their scorecards. In order to create a set of objectives can be used in Workplace for Business Strategy Execution, the team will need to have identified following information:

- ▶ Identifying the Objective: What is the objective?
- ▶ Measuring the Objective: How do you measure that objective? What data do you use to support it? What form is that data in (that is, number, percent, currency, or other)?
- ▶ Linking the Objective: Are you dependent on others to achieve this objective? If so, who? Does their data influence your data?

Identifying the objectives

Creating objectives that meet your strategy can vary in time and effort depending on what information you already have in your company. Often, it is best to begin with what you already analyze and use. For example, performance reports and status updates can be good places to begin. Often, the output from an executive strategy meeting can be used as objectives in Workplace for Business Strategy Execution.

Tip: Defining objectives is not a small task. Significant effort may be required to develop an organization's objectives for the first time. Our examples in this chapter mention three different ways to identify the top-level objectives. If your organization needs to develop a basic strategy or does not have a clear idea of what objectives to adopt, you may want to seek professional advice from consultants or advisors.

Measuring the objectives

An objective must be measurable. How accurately an objective is measured depends on the data that is available to support the objective. For example, an objective to "Improve client satisfaction" could be measured by a score on a client survey, a poll to account executives, number of client complaints, percentage of service level agreements dishonored, or number of lost clients. We call these *metrics*, and these metrics can be used to influence one or many objectives through linkages.

When creating a new objective, you also need to know what metric you are going to use to measure that objective. The metric you use needs to exist somewhere in the organization so that it can be used in the objective. For example, if you want to use client satisfaction survey scores, that data will likely be stored in a database that an Administrator can access. It is also necessary to know what format you want the data to appear in your objective - currency, percentage, number, or yes/no. Note that if the survey score is in numeric format in the database, you can display it as percentage in your objective.

Linking objectives

As you get started, keep in mind that objectives can be linked. The topmost goals in an organization drive strategy, and thus must drive the objectives throughout the organization. We suggest that all objectives link to one of the topmost objectives or to another objective that eventually links to the topmost objectives. This ensures alignment of the strategy at every level. Objectives that are directly linked to others in this way also contribute to their parent objective's status. These are called *Alignment Linkages*.

While there is an explicit hierarchy, there is also the ability to indirectly link objectives, called *Dependency Linkages*. Dependency linkages do not contribute to each other computationally; rather, they illustrate a cause-effect relationship. For example, while an "Increase Sales" objective may not be directly linked to the metrics supporting a "New Product Development" objective, product development has significant impact on the sales figures.

Workplace for Business Strategy Execution can also handle objectives that do not need to roll up to the topmost levels of the organization. For example, objectives that are point-in-time objectives, like "Fix troubled accounts", or operational in nature, like "Complete weekly reports on time", may not have any computational value to the strategic goals of the company. Companies can give control to specific individuals in their organization to create objectives at their own level and align them within their business area. Companies can require that these objectives be indirectly linked to any of the top-down objectives, depending on their needs. As mentioned above, this allows organizations to deploy Workplace for Business Strategy Execution into individual business areas first and connect those areas to higher-level objectives later.

3.1.4 How information is currently tracked

Wherever possible, it is very helpful to understand how the metrics being asked for on the scorecard are being currently tracked. You may find some of them are tracked in reports, some are stored in spreadsheets, and others may be in software systems or databases.

Tip: The fastest way to get started is to work with imported spreadsheet data, especially if the databases are not set up to provide Web services. Often, organizations will begin by using spreadsheet imports of data and then move to back end access when the services are set up.

Reports and spreadsheets

Since the accuracy of an objective depends on the data that is available to support it, a comprehensive list of all the reports related to the identified objectives and initiatives should be compiled. Some examples may include a spreadsheet from accounting, a presentation on the results of a client survey, or a document describing the expectations for the company's initiatives. Often, this information can help shape the scorecard owners' format for their objectives.

In many cases, you may find that data in the reports and spreadsheets is being fed from a database or other automated system. It is important to understand the difference between the source system and the report in order to choose which is going to be used with Workplace for Business Strategy Execution. If a spreadsheet is based on a system but is manually adjusted to account for data that is not stored in that system, it is best to use the spreadsheet as the data source for the objective. If the data is identical, then you will want to consider directly accessing the data source through Workplace for Business Strategy Execution.

Let us take an example. Client service survey results are stored in a database. Product satisfaction results are stored in another database. A client satisfaction report is built, and uses both of these databases to determine an overall client satisfaction score. If the scorecard owner wants to use the client satisfaction number as the metric supporting the objective, it would be best to use the report as the data source.

Software systems and databases

Much of an organization's data may be stored in software systems or databases. Starting with the objectives and initiatives identified by the scorecard owners, identify which objectives are being supported by data in a system or database. This information will be important to the next step.

3.1.5 Where data resides

Once you identify which metrics to use and how they are currently being tracked, the next step is to identify the individual data sources and their owners. Data may reside in a user's desktop or a back-end data system. No matter where the data resides, the owners of the data must be identified, as they may be responsible for keeping it up to date.

- ▶ **Spreadsheets:** Identify which spreadsheets contain data that need to be fed into the objectives. Spreadsheets are often used to track information or format data from a back end system. You can continue to track information in spreadsheets and use them in Workplace for Business Strategy Execution. Individuals can import data directly from a spreadsheet into Workplace for Business Strategy Execution, a feature that is described in 5.2.3, "Data sources for reporting actual values" on page 74.
- ▶ **Data Sources:** Identify which sources would be required to feed values into the objectives. Data Sources can be accessed via Web services and used in Workplace for Business Strategy Execution.

Data Sources cannot be accessed directly with Workplace for Business Strategy Execution; they must be accessed via a Web service. If you have data sources but do not have Web services for them, you will need to create the services before allowing users to access them. You may want to consider tools like WebSphere Portlet Factory for help on connecting to data

sources and generating Web services. See Chapter 6, “Dashboard” on page 103 for more information about these tools.

An administrator must set up a Web service in Workplace for Business Strategy Execution before it can be selected as a data source by an end user when creating an objective. For more information about accessing data sources with Web services, see Chapter 7, “Data sources” on page 127.

While in the process of setting up services, you can use manual entry or spreadsheet import as your methods for getting data into Workplace for Business Strategy Execution.

3.1.6 Deciding on dashboards

The Pilot Team will have the option of choosing dashboard pages to display in context with their objectives. Dashboards are a collection of portlets that contain detailed data on objectives or initiatives. Every objective and initiative can be linked to a specific portal page or Web address, bringing to view more detail on the objective and how it is performing.

To begin choosing which dashboards to create, it is best to meet with the Pilot Team and use the current set of reports as a starting point. Decide which information needs to go on a dashboard and which objectives the dashboard page will be linked to. Keep in mind that dashboard pages can be used by more than one person; for example, a Sales dashboard could be shared by an entire sales team.

Once the team has decided what it wants to view, the next step is to decide which portlets to use. There are some free portlets that come with the product. There are also approximately 1,500 portlets available in the IBM Workplace Solutions Catalog, or you can create your own portlets. If you create your own portlets, you should allow time for development.

There is much more information regarding dashboards in Chapter 6, “Dashboard” on page 103.

Tip: For the most up-to-date information about portlets, including the latest portlets that are available for download, visit the IBM Workplace Solutions Catalog at:

<http://catalog.lotus.com/wps/portal/workplace>

3.2 Rolling out Workplace for Business Strategy Execution to your Pilot Team

Now that you have installed Workplace for Business Strategy Execution and identified the key people, data, and resources needed to deploy it, the next step is to have your scorecard owners begin using the tool and creating objectives. Since the majority of information needed in this step was decided earlier, this step will mostly involve having them work with the tools. The scorecard owners will likely do the following in this step:

- ▶ **Assign permissions:** Owners can grant people the role of Administrator, Delegator, and other in the scorecard and Objective/Initiative Permissions settings. See “Setting permissions” on page 87 for more information about how to set permissions.
- ▶ **Create Objectives and Initiatives:** Scorecard Owners and Scorecard Administrators can create new objectives, set targets for the objective, establish linkages, and choose data sources. See “Creating a new objective or initiative” on page 64 for more information.

With the second step, there may be requests for new data sources. Keep in mind that at this point, the Pilot Team will be pushing objectives and linking to objectives, creating a large set of objective and initiative data.

3.3 Two scenarios for deployment

To better illustrate the earlier sections, we will describe how the two organizations introduced earlier move through the process of preparing to deploy Workplace for Business Strategy Execution, including defining objectives. In the first example, the users can start with objectives that have already been defined. In the second case, objectives must be created for the first time.

3.3.1 ITSO Insurance Company

The company's Workplace for Business Strategy Execution Pilot Team knew, before beginning preparation for the new system, that all executives had agreed to a set of objectives at the beginning of the year as the basis for compensation decisions at the end of the year. They thought that those objectives might become the objectives for the individual's scorecards.

The good news

The VP of Human Resources observed that most of the objectives on the performance review forms were related to the company's financial statements, and so data for actual results was readily available from the monthly financial reporting system. Also, some of the objectives and metrics were relatively sophisticated, for example, product lines measured by return on allocated capital, adjusted for risk.

Another piece of good news was the adoption, about two years ago, of Balanced Scorecard principles for the corporation and for individual managers. That meant there were at least two, and often three or four, non-financial objectives for each manager.

Some hurdles

The Pilot Team found, when they examined the objectives in the compensation plan, some potential problems:

- ▶ **Linkages:** Objectives were tied closely to corporate objectives for the CEO, but the relationship between individual and corporate objectives was looser the further down in the organization they looked.
- ▶ **Metrics:** For some non-financial objectives, the metrics were not specified, and so periodic progress reports on those objectives were largely statements of activity, leaving it to the reviewer to guess whether real progress was being made.
- ▶ **Review frequency:** Progress reviews were quarterly: too long to take action on a slipping objective and still reach the target by year-end. As a result, reporting on objectives in the compensation plan tended to be backward looking, keeping score for performance reviews at year end. The HR member of the Pilot Team pointed out that collecting, recording, and validating the progress reports each quarter was a special, major exercise and could not be done any more frequently.

First steps

The Pilot Team acknowledged those challenges, but also believed that Workplace for Business Strategy Execution offered tools to help overcome them. One was the linkage features of Workplace for Business Strategy Execution, which would encourage the discipline to align objectives among organizational levels. Another was the facility for reporting actual results without the special updating projects. This meant that a monthly reporting cycle was possible.

The team's first decisions were:

- ▶ Authorize installation of Workplace for Business Strategy Execution Version 1.0 Enterprise Edition, for the higher user capacity that it provides.
- ▶ Adopt the CEO's objectives as the corporate scorecard and decompose them into elements that can be pushed to the functional division heads. Develop scorecards for those four executives.
- ▶ Choose one division for aligning individual objectives with the corporate objectives and work down two levels below the division head.
- ▶ Once a set of objectives are developed for that 'pilot' division, link them, identify metrics, and begin reporting the actual values that are available, on a monthly basis. Plan to run the system in parallel, without replacing the compensation system, for the rest of the year. Add sources of data as they become available.
- ▶ Then set up objectives and their properties for the other divisions.

The team also engaged the IT organization early on to make sure the needed data sources have Web services. IT let the team know that Web services were not currently created for their data sources, so the team will use the spreadsheet import option until the Web services are built and available for more automated data update.

The team then believed they were ready to start setting up objectives and initiatives in Workplace for Business Strategy Execution.

Defining the company's objectives

ITSO Insurance employs 6,000 people. There are four executive vice presidents (EVP) reporting to the company CEO, Dennis Michaels. Each EVP owns at least one major business unit in the company. Dennis is concerned with the company's ability to stay on top of underwriting operations in the branches. He understands that each branch office has local needs, but he wants to see how well the branches are performing to assess the adequacy of their plans.

Dennis needs to be able to see the company from one point of view instead of several. He wants to know what new business the company is doing and how much of their business they are able to retain. He wants to know if each of his business units are controlling their expenses according to their budgets. He wants to understand their ability to target new and renewal clients. He knows the company already keeps track of this information, but he wants to see it all in one view, to anticipate any problem areas.

The following are the objectives already created for the current year on Dennis' performance evaluation summary. He guesses that the Pilot Team might have to work to reconcile the objectives with the performance indicators he has in mind:

1. Achieve insurance premium revenue targets (Financial perspective).
2. Increase revenues from insurance-related services by 20% (Financial perspective).
3. Earn a return on equity of 12% (Finance perspective).
4. Maintain costs (Finance perspective).

5. Design and launch an insurance program for home building contractors (Client perspective).
6. Introduce a proprietary service Web site for commercial policyholders (Internal Business Processes perspective).
7. Review management compensation program (Learning and Growth perspective).

Identifying reports and data sources

To track financial results monthly and issue reports to shareholders and regulators quarterly and annually, ITSO Insurance, like virtually all insurers, has an integrated accounting and reporting system. It is supported by subsystems such as premium accounting, claims accounting, and administrative expenses. Consequently, a wide range of financial metrics are available and tie together.

However, data that does not feed financial reports and other long-established needs is harder to obtain and reconcile to the financial system, for example, recording units of exposure and calculating “burning costs”.

The Pilot Team for ITSO Insurance developed a list of reports and data sources related to the CEO’s objectives (Table 3-1).

Note: The reports and data course shown in Table 3-1 relate to reporting actual values for measuring progress on objectives. Other sources may be used to feed the company’s business processes.

Table 3-1 Reports and data sources for ITSO Insurance

| Perspective | Objectives | Reports | Sources (Owners) |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Financial | Achieve insurance premium revenue targets. Increase revenues from insurance-related services by 20%. Return on equity. Maintain Costs. | Gross premium production (monthly) Reinsurance ceded (monthly) Services revenues (monthly) Budget Spreadsheets (bi-weekly) | Enterprise system (Corporate Accounting, and Reinsurance Accounting) Enterprise system (Corporate Accounting, Loss Control & Engineering, and Captive Management) |
| Client | Design and launch an insurance program for home building contractors. | Claims reported by industry (monthly) Claims incurred by industry (monthly) Market results by product line (annual) | Claims accounting system (Corporate accounting, Claims Div.) Am Best Co. and ISO (Underwriting, and Actuarial) |
| Internal business processes | Introduce a proprietary service Web site for commercial policyholders. | Application development status Competitor Web site features | IT (IT, Underwriting, and Marketing) Insurance Web site evaluations (third party, and on Internet) |

| Perspective | Objectives | Reports | Sources (Owners) |
|---------------------|-----------------------------------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------|
| Learning and growth | Review management compensation program. | Human Resources project status report (quarterly) Project progress reviews | Human Resources PPT files (HR, compensation consulting firm) |

First steps for the company's senior users

Armed with the information about the reports and data sources they expected to use, the Pilot Team met with Dennis to begin introducing Workplace for Business Strategy Execution to the most senior users in the company. There were four topics the team wanted to discuss with Dennis:

Administrator: The team had previously asked Dennis to appoint a member of his immediate staff to act as administrator for his objectives. The appointment permitted the team to prepare the administrator for the role using IBM product documentation and some hands-on practice. In the meeting, the team wanted to review the role and activities of the administrator.

Access: The team reviewed with Dennis the individuals who would initially be granted access to each set of objectives. One of the objective administrator's first tasks would be ask the Workplace for Business Strategy Execution Administrator to create the access for those individuals.

First objectives: The administrator for Dennis' objectives then demonstrated how to enter the CEO's objectives and their properties, pushing some of them to the division heads, starting with the return-on-equity objective.

First users: The team then reviewed their plan to meet separately with each division head, for a tutorial on creating their individual scorecards, and planning the adoption of Workplace for Business Strategy Execution at the next two levels of their divisions. When making the appointments with the division heads, they sent them a copy of Chapter 4, "Scorecard" on page 43, with a suggestion to read it before their meeting.

3.3.2 ITSO Science Museum

Most of the museum's management team had some experience with defining objectives and setting targets, largely from prior positions. However, a set of objectives and targets for each manager had not been introduced at the museum, and so Judith Batista, the museum's Executive Director, began by reviewing the strengths and challenges that her team would bring to introducing Workplace for Business Strategy Execution.

Strengths

Judith recently accepted the offer by a corporate supporter to fund a Workplace for Business Strategy Execution installation for the museum. However, the donor corporation was just beginning its own conversion to Workplace for Business Strategy Execution and believed it could not spare the time of its Deployment Team to help introduce the system at the museum.

Although often short of resources, the Executive Director knew her organization had some advantages in introducing the powerful tools Workplace for Business Strategy Execution provided its users. First, the absence of a set of formalized objectives meant that there would be very little experience to be "unlearned" in the course of adopting a strategic planning framework for Workplace for Business Strategy Execution. Second, the museum had a worksheet-based accounting system, which could produce most of the financial metrics needed for tracking objectives and provide a platform for reporting visitor and member data for non-financial objectives. Finally, a trade association of children museums was an obvious source of comparative data for identifying "best practices" that might be applied in the museum. Judith was particularly interested in best practices for membership renewals and educational programs.

Challenges

In addition to the prospect of deploying Workplace for Business Strategy Execution without corporate staff help, the Executive Director was keenly aware of some challenges to be faced. Although visitor data was collected in a third-party system at the museum ticket counter, it had not been summarized for periodic reports or analyzed for any marketing review purposes.

The museum would also have to continue to solicit foundation grants and corporate donations to meet a portion of operating expenses. The Executive Director did not want to lose momentum in fund-raising while Workplace for Business Strategy Execution was being implemented; indeed, she was hoping Workplace for Business Strategy Execution would somehow help track and manage that effort.

The lack of experience with formalized objectives and pre-programmed metrics - in one way, an advantage - was also a potential problem.

On balance, the Executive Director was excited about the prospective changes that Workplace for Business Strategy Execution would bring to the museum.

The starting points

The deployment team's initial decisions were:

- ▶ Authorize installation of Team Edition of Workplace for Business Strategy Execution Version 1.0, for the easier installation and startup that it provides.
- ▶ Hold a half-day meeting with the management to determine the organization's objectives. The majority of these would end up being driven from the Executive Director's scorecard.
- ▶ Choose one division for aligning individual objectives with the corporate objectives and work down two levels below the division head.
- ▶ Once a set of objectives are developed for the three senior managers, link the objectives, identify metrics, and begin reporting the actual values that are available on a monthly basis. Add sources of data as they become available.

The team then believed they were ready to start setting up objectives and initiatives in Workplace for Business Strategy Execution, starting with the senior managers.

Defining the museum's objectives

The museum employs about 35 people and each week is able to draw from a pool of some 50 volunteers. The museum's mission is clearly defined, but it has not been translated to a set of objectives for each of the managers.

In a half-day meeting led by a professional facilitator, the management group chose the following objectives for the Executive Director’s scorecard:

1. Increase program revenues by 15% for the current year. (Finance perspective)
2. Obtain \$200,000 from new corporate sponsorships. (Finance perspective)
3. Increase average number of visitors per day by 12%, by year-end. (Client perspective)
4. Raise number of new memberships by 10% for the year. (Client perspective)
5. Seek partnerships with other science museums to exchange two exhibits or programs in a year. (Internal Process perspective)
6. Design and introduce a new program to reward volunteers, by end of Q2. (Learning and Growth perspective)

Identifying the Museum’s reports and data sources

There was considerable data about visitor volumes, revenues, and expenses but relatively little recent data on visitor satisfaction and suggestions. The management group met once a month and discussed how things were going from their own perspectives. Two departments kept track of data in spreadsheets or presentations.

One that keeps track of metrics is Carrie, director of finance. She uses a spreadsheet to track incoming grants and donations. Lars (Exhibits and Marketing) keeps track of statistics from the entry desk system. He also compiles information for presentations for the Executive Director to use in soliciting corporate donations.

The deployment team decided to continue tracking the Executive Director’s fund-raising activities in a spreadsheet and generate reports on the number and value of grants and donations that her activities generate.

Important: A collaborative effort is usually needed to get the data and reports put together. It is also important to identify the data source of the reports you generate or intend to generate. A company must establish who owns that data and who is in charge of updating it, along with identifying who owns what objectives and how to support those objectives with metrics.

An inventory of reports the Museum’s management team wants to generate was developed by Carrie, the museum’s finance director, as shown displayed in Table 3-2.

Table 3-2 Reports and data sources for ITSO Science Museum

| Perspective | Objective | Reports | Sources (Owners) |
|-------------|---------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------|
| Financial | Increase program revenues for the current year. | Monthly profit and loss statement Catalog and schedule for programs | Spreadsheet (Finance) Text document (Education/Programs) |
| | Obtain \$200,000 from new corporate sponsorships. | Monthly donations and grants status report Monthly profit and loss statement | Spreadsheet (Executive Director) Spreadsheet (Finance) |
| | Maintain spending targets. | Monthly budget | |

| Perspective | Objective | Reports | Sources (Owners) |
|-----------------------------|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Client | Increase average number of visitors per day by 12%, by year-end. | Visitor counts by day, averaged and weather-adjusted | Entry desk system, summarized on spreadsheet (Exhibits/Marketing, Finance) Daily weather history from NOAA (Exhibits/Marketing) |
| | Raise number of new memberships by 10% for the year. | Memberships expiring in each month; memberships renewed, by expiration month | Entry desk system, summarized on spreadsheet (Exhibits/Marketing, Finance) Membership data spreadsheet (Finance) |
| Internal business processes | Seek partnership with other museums, to exchange 2 exhibits or programs a year. | News about exhibits at other science museums | Relevant press releases and other media coverage from online sources (Marketing/Exhibits) |
| | Initiate new programs. | Exhibit and event news on other museum Web sites Progress reports to ED | Weekly scan of other museum Web sites (Marketing/Exhibits) Text document (Marketing/Exhibits) |
| Learning and growth | Design and introduce a new program to reward volunteers by the end of Q2. Increase number of employees. | Monthly progress reports Numbers of part-time, full-time and volunteer employees | Text document (ED and Volunteer Coordinator) |

First steps for the museum's users

In one of her weekly meetings with the department heads, Judith led a discussion of near-term arrangements for introducing Workplace for Business Strategy Execution:

Administrator: Judith had decided that the Pilot Team for rolling out Workplace for Business Strategy Execution would be the department heads themselves, assisted by both Carrie (a department head, Finance, herself) and the Workplace for Business Strategy Execution System Administrator, who is a member of Carrie's department. Judith and each department head would also act as a scorecard level administrator for their own objectives, with assistance from Carrie

Access: The Workplace for Business Strategy Execution administrator had set up access for the management group and for the managers and staff reporting directly to them.

Executive Director's objectives: Carrie and the Workplace for Business Strategy Execution administrator would conduct a two-hour introductory seminar for the management group, to enter Judith's objectives and demonstrate how to enter objectives for each of the group. Required reading for the meeting: Chapter 4, "Scorecard" on page 43 and Chapter 5, "Creating objectives, setting targets, and tracking progress" on page 63.

Departmental objectives: Each departmental head would hold a meeting with all their direct reports, to identify their objectives and associated metrics. Those meetings were expected to take at least half a day.

First users: Carrie and the Workplace for Business Strategy Execution administrator would then repeat the introductory seminar in each department, for its managers and staff. In the seminars, the users would learn how to enter and maintain their own objectives. Required reading for the meeting: Chapter 4, “Scorecard” on page 43 and Chapter 5, “Creating objectives, setting targets, and tracking progress” on page 63.

3.4 A checklist for getting started

In this chapter, we discuss and illustrate the major steps to begin implementing Workplace for Business Strategy Execution. The following is a checklist as a reminder of the steps for new deployment of the application.

- ▶ Edition: Which edition of Workplace for Business Strategy Execution are you going to use?
 - Decide on Team Edition on Workplace Services Express or Enterprise Edition on WebSphere Portal.
 - Install the product.
 - Connect to your company LDAP.
- ▶ Pilot Team: Who will be involved in the deployment?
 - Choose a deployment team.
 - Identify scorecard owners and administrators.
 - Appoint a Workplace for Business Strategy Execution System Administrator.
 - Engage IT organization to create Web services for data sources.
- ▶ Objectives: What objectives and initiatives need to be tracked?
 - Identify the corporate objectives and initiatives.
 - Choose metrics that will track senior scorecard owners in completing their objectives and initiatives.
 - Diagram the objectives to be pushed down to succeeding levels and how other objectives and initiatives should be linked.
- ▶ Metrics: How are objectives being tracked now?
 - Examine current reports to understand how data is being tracked.
 - Identify data that is not tracked but needs to be.
- ▶ Data sources: What data sources are used for this information?
 - Find the source for data that is used to generate reports.
 - Locate the sources for data that is not available in existing reports.
 - Identify the owners of those data sources.
- ▶ Dashboards: What dashboard views will be needed, related to which objectives?
 - Create dashboard pages.
 - Link dashboards to objectives/initiatives.



Scorecard

In this chapter, we introduce the Workplace for Business Strategy Execution scorecard and describe how it can be used to track objectives and initiatives in an organization. We also describe the different features and methods for using the scorecard as well as the resources that can be used in relation to the scorecard.

This chapter describes the following:

- ▶ An introduction to the scorecard
- ▶ A description of objective and initiative management
- ▶ A discussion of linkages and dependencies
- ▶ Methods for taking action in the scorecard
- ▶ Resources that can be viewed in context to the scorecard

4.1 Using Workplace for Business Strategy Execution to align your strategy

Strategy alignment is based on the idea that the leaders of an organization have access to all relevant performance information within their companies. Corporate leaders review their company's prior performance, changes in the environment, and competition to determine the path their organization should take. This process is complex, leveraging a great deal of information to produce challenging and effective goals. Collectively, their understanding of the organization's capabilities, in light of external factors, is what determines the overall strategy. Armed with this knowledge and direction, corporate leaders set in place the goals for the company to achieve.

Once a strategy is determined, it is communicated to the members of the organization. While a great deal of time goes into setting a strategy, often the final strategy gets lost in this communication, or worse, employees do not see a connection between their work and the strategy. Furthermore, corporate leaders have difficulty determining how their goals are performing; any corrective actions that could get the company on target are not put in place.

Workplace for Business Strategy Execution enforces strategy alignment by setting the goals of the organization as the foundation upon which all objectives are created. These goals in turn get passed to each layer of the organization, who create objectives to achieve the goal. This link is the key to providing visibility and ensuring alignment throughout the organization.

A top-down view of the strategy is incomplete, however. Individual contributors who perform operations and track their own objectives are important to understanding how the strategy is being executed. Data rolls up from all areas of the organization to show how the key strategic elements are performing. This constant cycle of strategy setting and evaluation allows an organization to continually refine their objectives, initiatives, and targets.

4.2 Introducing the Workplace for Business Strategy Execution scorecard

Workplace for Business Strategy Execution scorecards provide the capability to facilitate strategic execution across the organization. On the scorecard, managers can turn their strategy into measurable goals and communicate these goals to appropriate persons. Managers can also see the impact of business events across the company.

There are five basic principles guiding the Workplace for Business Strategy Execution scorecard

- ▶ The scorecard contains a set of objectives: Objectives are established by individuals. Objective setting can occur as a top-down process, where senior management may establish a company strategy and cascade objectives that relate to this strategy throughout the organization. Objective setting can also occur at the individual level and be tied to the organization's overall strategy. Once objectives have been decided, Workplace for Business Strategy Execution lays them out with their respective dependencies.
- ▶ Objectives are organized by perspectives: Scorecards are divided into perspectives, or categories, that group the objectives and initiatives. These perspectives are common to the organization. To be flexible with an organization's management practices and methodologies, perspectives are defined by the organization. There can be any number of perspectives (financial, competitive, education, and so on).
- ▶ Progress on each objective is tracked through associated metrics: These metrics can span multiple back-end systems, processes, data sources, or even people. Individuals can specify which and how much of their data will be reported as the actual values achieved.

Individuals can also indicate performance without using a data source by importing data, manually updating data, or giving a subjective assessment. They can also specify thresholds for the metric, choosing which values to associate with a red, yellow, or green status.

- ▶ Objectives are achieved through initiatives: Most objectives require a plan of action to achieve their goals. These associated actions, called *initiatives* in Workplace for Business Strategy Execution, can also be measured with metrics. Initiatives can be used any number of ways, although they most often are used to communicate plans.
- ▶ Objectives are linked to other objectives: It is imperative that organizations understand how their objectives impact each other. Linked objectives foster alignment with corporate objectives and strategy. The scorecard shows relationships among objectives; the two relationships that link objectives are alignment relationships and dependency relationships.
 - An *alignment* objective contributes directly to another, superior objective, and its results can be rolled up into the superior objective. For example, each region's sales volume is the sum of the sales figures of every sales representative in the region. This is represented as a solid line in Figure 4-1.
 - A *dependency* has an impact on another objective without necessarily contributing to its reported actual values. For example, a sales team's success might be dependent on reducing the elapsed time for order processing, an objective in the internal process perspective. While the reduction in order processing time does not directly affect the sales team's volumes, it could have an impact on the team's ability to perform. This is represented as a dotted line in Figure 4-1.

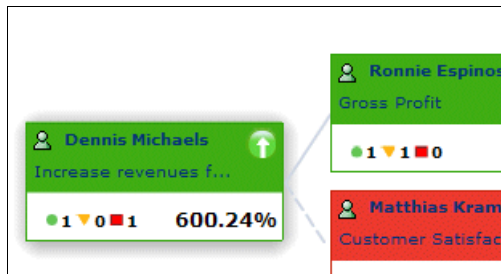


Figure 4-1 Objectives are linked to other objectives

4.3 The components of the scorecard

When you log into Workplace for Business Strategy Execution, the first page that appears by default is a Welcome page. Click the **Business Strategy Execution** tab at the top to be taken to the main scorecard view. This will bring you to your personal scorecard, similar to the example in Figure 4-2.

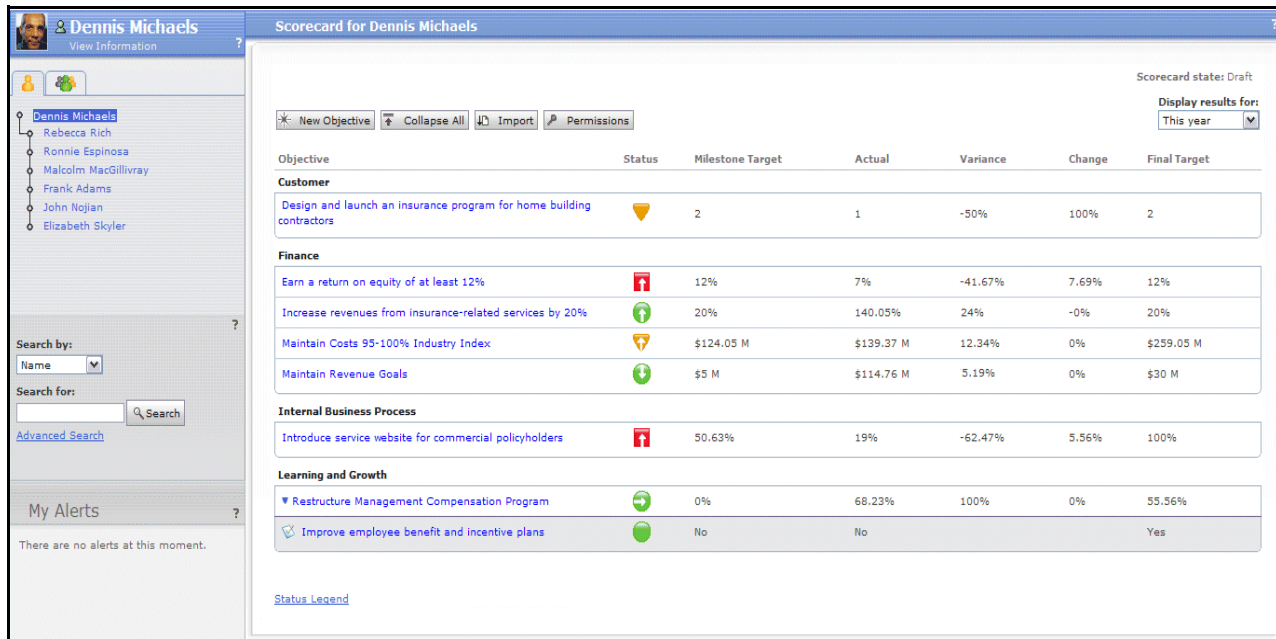


Figure 4-2 Workplace for Business Strategy Execution scorecard view for ITSO Insurance

Your scorecard will contain the objectives and initiatives that you are tracking. These may be objectives you are held accountable for in your organization or even items you hold others accountable for. The scorecard displays a set of information related to these objectives and initiatives, including their status, targets, and actual values.

Attention: The first time you log into the scorecard, it will likely be blank. People cannot push you objectives or initiatives until you have logged into your scorecard at least once and have created an objective.

4.3.1 Perspectives

The scorecard is divided into a set of perspectives that are used to group the company's scorecards into a set of common categories (see Figure 4-3 on page 47). These perspectives appear on the scorecard and group the objectives and initiatives accordingly. Organizations can use the four default perspectives or create their own.



Figure 4-3 Scorecard perspectives

The default set of perspectives included in the product are:

- ▶ Client
- ▶ Finance
- ▶ Internal Business Process
- ▶ Learning and Growth

These perspectives are customizable in the Administrator's tools, and any number of them can be created. Once created, the perspectives are common for the entire organization. When people create a new objective, they will have the entire set of perspectives available to them to group their objectives.

Other popular perspectives created by Workplace for Business Strategy Execution user organizations are:

- ▶ Leadership
- ▶ Strategic Planning
- ▶ Sales and Expenses
- ▶ Client and Market Focus
- ▶ Development
- ▶ Human Resource
- ▶ Process Management

4.3.2 Objectives and initiatives

Objectives are central to Workplace for Business Strategy Execution, as they ensure alignment of an organization's goals, accountability throughout the organization, and facilitate decision making and action. An objective describes the intended outcome that will achieve a strategy. Workplace for Business Strategy Execution includes sample data that gives you examples of some objectives and initiatives. We are also going to look at the Objectives for our two companies, ITSO Insurance and ITSO Science Museum (see Table 4-1).

Table 4-1 The top level objectives for ITSO Insurance and ITSO Science Museum

| ITSO Insurance's top objectives | ITSO Science Museum's top objectives |
|-----------------------------------------------------------------------|---------------------------------------------------------|
| Design and launch an insurance program for home building contractors. | Raise number of new memberships. |
| Earn a return on equity of at least 12%. | Increase program revenues. |
| Increase revenues from insurance related services by 20%. | Maintain spending targets. |
| Maintain costs 95-100% of industry index. | Obtain new corporate sponsorships. |
| Maintain revenue goals. | Increase partnerships to increase exhibit exchange. |
| Introduce a service Web site for commercial policyholders. | Initiate new programs. |
| Restructure management compensation program. | Design and introduce new programs to reward volunteers. |
| Improve employee benefit and incentive plans (initiative). | Increase number of new employees. |

Let us take a look at the scorecards for each of these companies.

Dennis Michaels is the CEO of ITSO Insurance. On his scorecard are four objectives in the Financial perspective, in part reflecting the fact that, for a functionally-organized company such as ITSO Insurance, the only true profit center is the CEO's position (see Figure 4-4 on page 49). Moreover, two of his financial objectives contain *stretch targets* for a competitive market such as property/casualty insurance. For example, Dennis will push components of the return-on-equity objective to the functional division heads.

The objective in the client perspective, to create an insurance program for home builders, reflects a potential opportunity. Insurers have found home builders difficult to underwrite and so have been raising the rates, maybe beyond the level needed to pay claims and expenses and then produce a profit that, at least, meets the cost of the capital to support that business. Dennis has heard that home builders are looking for innovative ideas to obtain their insurance at rates that are more stable than what they have been charged in recent years.

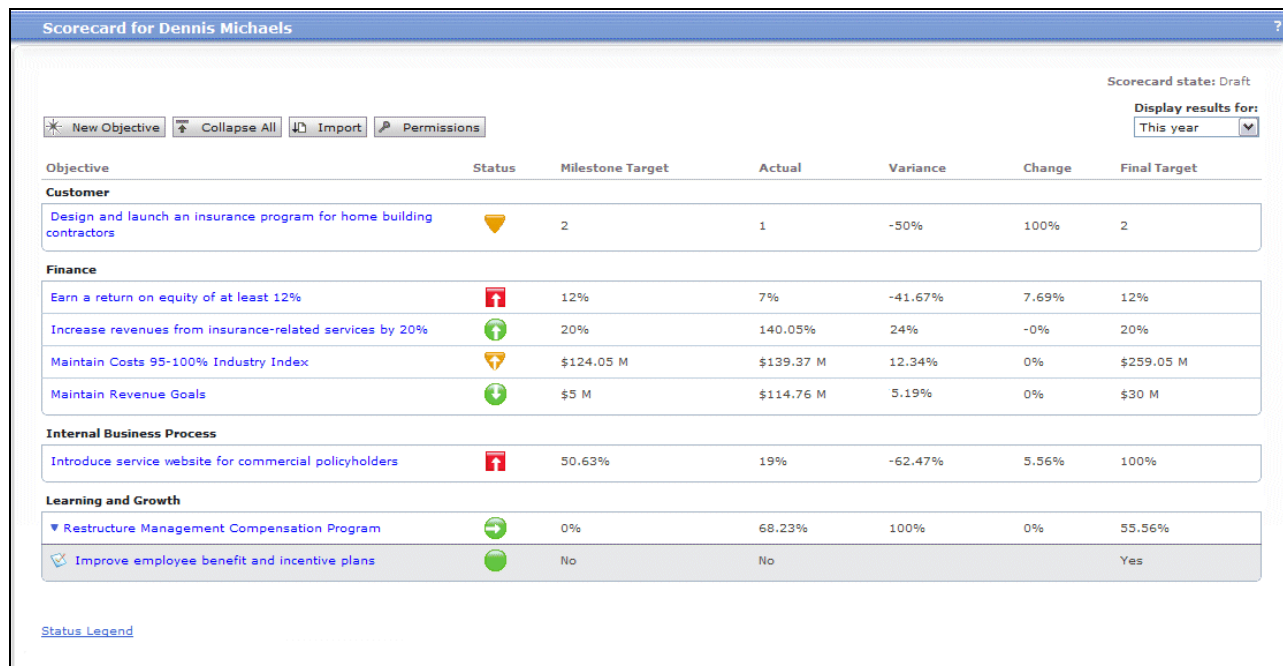


Figure 4-4 Scorecard for Dennis Michaels, the CEO of ITSO Insurance

Judith Batista is the Executive Director of the ITSO Science Museum. Her scorecard contains three financial objectives in the financial perspective, two of which are aimed at two of the major sources of income for science museums: memberships and donations/grants (see Figure 4-5). Two other objectives were chosen to build visitor volume: new programs and exhibit exchanges. Programs are valuable contributors to revenue: typically, the fees per visitor-day are over twice the entry fee paid by walk-in visitors.

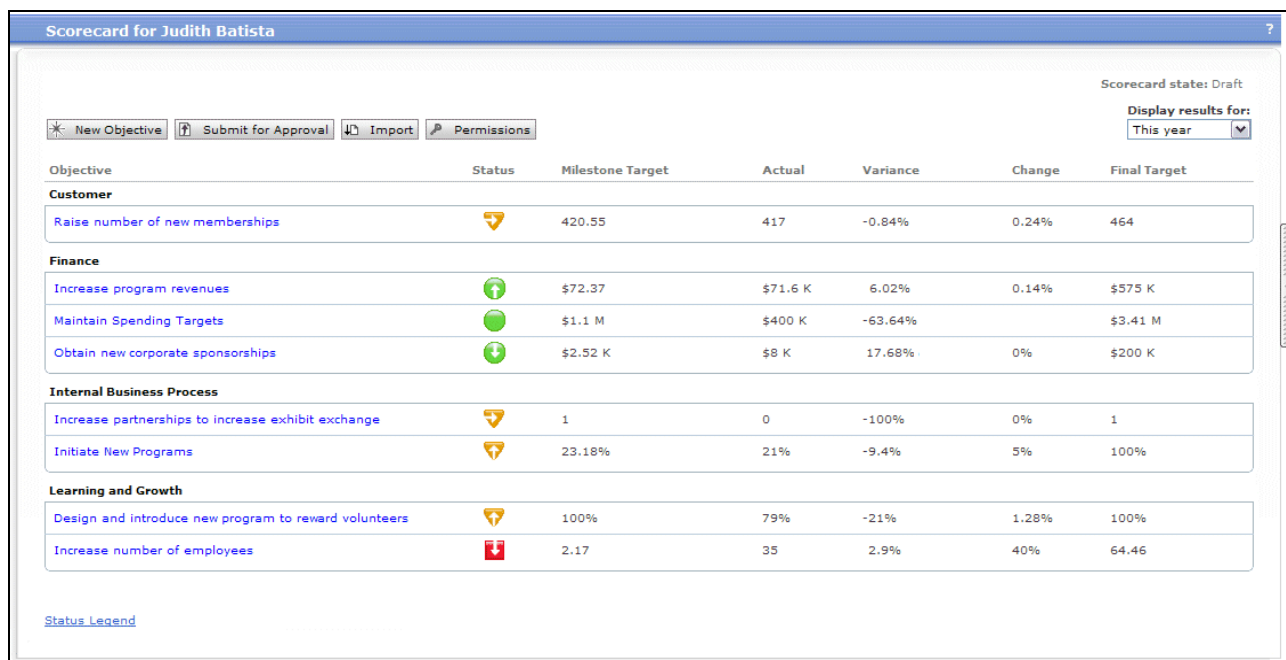


Figure 4-5 Scorecard for Judith Batista, Executive Director of the ITSO Science Museum

The scorecard contains measurable objectives

The accuracy of an objective depends on the data that is available to support the objective. For example, an objective to "Introduce service Web site for commercial policyholders" could be measured by the date the Web site was released, the number of policyholders covered in the Web site, usage of the Web site by policyholders, or percentage of the Web site complete. Workplace for Business Strategy Execution can support all of these types of metrics, as well as combinations of different types.

There are four generic types of measures supported in Workplace for Business Strategy Execution: percentage, currency, number, and yes/no (Boolean). Boolean type is used predominantly in cases where numeric data does not exist. For example, "Improve employee benefit and incentive plans" may require a simple "yes" or "no" when reporting on that objective, and the objective owner would use the Boolean type for that. The type of metric is chosen when you create a new objective.

Initiatives are actions that achieve objectives

Often an objective requires a plan of action to achieve its goal. Objectives can have initiatives that can be measured by their own set of metrics. An individual may create one or more initiatives for achieving their objectives. Objectives and initiatives are differentiated by whether they are a goal or an action. Said another way, when one sees an objective, the next question may be "how do I meet this objective?" The answer is an initiative or a series of initiatives. Conversely, when one sees an initiative, the question should be "Why am I doing this?" The answer is the objective. Initiatives are always owned by the individual who owns the associated objective.

Figure 4-6 gives you an example of objectives and initiatives.

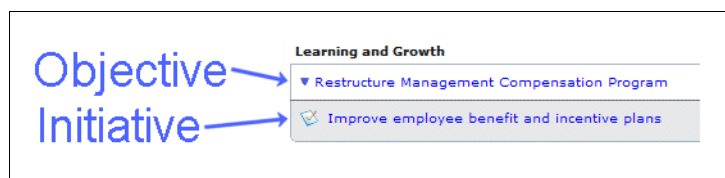


Figure 4-6 Objectives and initiatives example

An objective may have one or more related initiatives attached to it. Initiatives are tracked like objectives in that they have a status and trend, targets, and actual values. While there is a link between an objective and its respective initiative(s), the initiatives do not roll up to the status of that objective.

The scorecard displays a combined status and trend

Both the status and trend of an objective is indicated by one visual icon.

- **Status:** Status is the current condition for an objective or initiative based on the performance of an actual value. Status can be positive, moderate, or negative. The color of the icon is determined by comparing the target values to the actual values. If the actual value meets or exceeds the target, the status color is green. If the actual value is moderately below target, the status color is yellow. Finally, if the actual value is severely below target, the status color will be red.
- **Trend:** Trend is a series of related measurements that indicates a defined direction or predictable future result. If actual values rise at a rapid pace, the trend is calculated as an uptrend. Trend can be in an uptrend, flat trend, or downtrend. The trend line is based on the actual values that have been logged in the system. If the actual values are indicating an overall improvement in the objective, the arrow will point up. If the actual values are showing no significant change, the arrow will be horizontal and point right. Finally, if the

actual values show an overall decline in performance, the arrow will point down. If there are not enough actual values to calculate trend, a status icon will appear without an arrow. Figure 4-7 shows twelve possible status and trend indicators.

| Icon | Description | Icon | Description |
|------|--------------------------------|------|----------------------------------------------|
| | Positive status with uptrend | | Positive status with flat trend |
| | Positive status with downtrend | | Positive status with insufficient trend data |
| | Moderate status with uptrend | | Moderate status with flat trend |
| | Moderate status with downtrend | | Moderate status with insufficient trend data |
| | Negative status with uptrend | | Negative status with flat trend |
| | Negative status with downtrend | | Negative status with insufficient trend data |

Figure 4-7 Twelve possible status and trend icon combinations.

The number of values used to calculate trend is decided by the Administrator and set in the Product Settings. For more information, see 8.2, “Understanding product settings” on page 152.

The Target Scheduler displays milestone and final targets

Every objective will have a different set of targets and may even have different time schedules. For example, in Figure 4-8, we see a tool called the Target Scheduler displaying an objective that has monthly targets. These targets are represented by the blue dots. The *target line* is the one bordering the green and yellow zone. Objectives can have daily targets or even yearly targets, changing the number of dots represented on the screen.

An individual can move the targets points on screen. They can drag the points or type in specific values for the point. Targets can also be modified using the template patterns shown at the bottom. Using these will modify the shape of the entire curve.

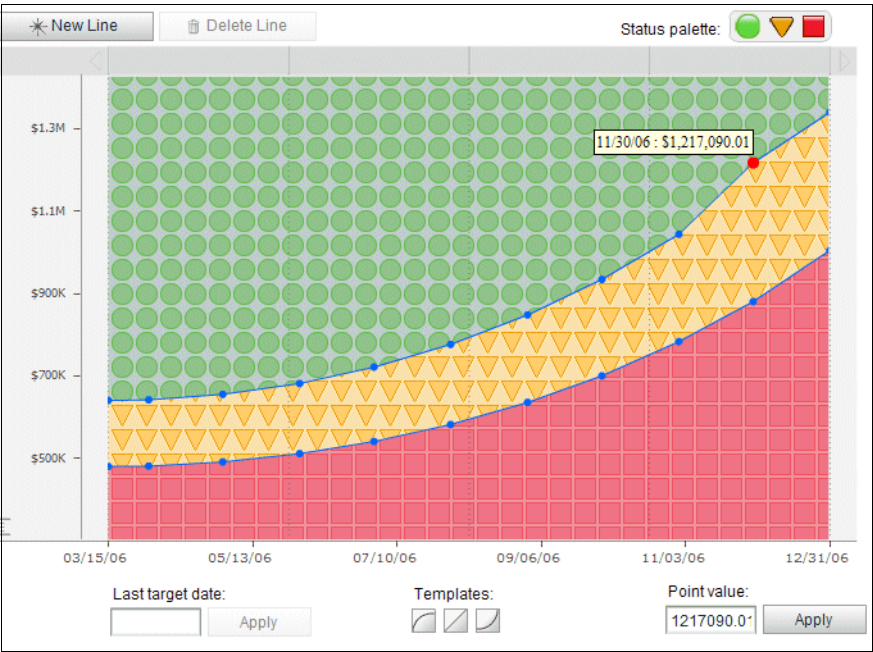


Figure 4-8 Setting targets using the Target Scheduler

The next milestone target is what appears in the scorecard view in the Milestone Target column. The final target is displayed in the column furthest to the right on the scorecard. Hovering over these numbers will tell you when the target dates are expected to be achieved, as shown in Figure 4-9.

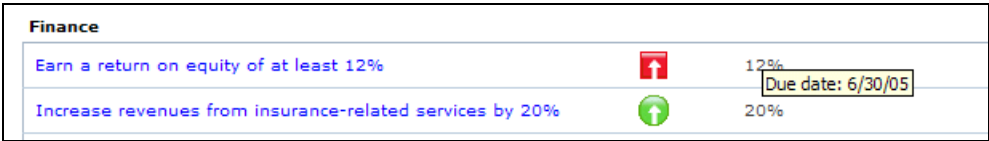


Figure 4-9 Hover over data in the scorecard to see additional information

The scorecard analyzes Variance and Change

The Variance column of the scorecard represents the difference between the actual value and the target value as a percentage. For example, if your objective target is 100 and your actual value is 30, you will see a variance of 70%. If your target is 10 and your actual value is 12, you will see a variance of 120%. Hovering over the variance number will tell you the variance of the previous actual value.

The Change column on the scorecard displays the difference between the latest two actual values updated in the system. For example, take an objective whose data is updated monthly. If this month's value is 25% and last month's value is 10%, the change will be 15%. Hovering over the change data will tell you the previous change, which, in our example, would be the difference between last month's value and the value from two month's ago.

4.3.3 Linkages and dependencies

The topmost goals in an organization drive strategy, and thus must drive the objectives throughout the organization. Ideally, all objectives link to the overall strategic objectives in some form. This ensures alignment of the organization's strategy at every level.

Two types of linkages

The Status Map displays the linkages. In Figure 4-10, we see ITSO Insurance's overall objective of "Increase revenue [from insurance related services]", owned by Dennis. There are two objectives that are linked to his, Gross Profit and Client Satisfaction. Notice the solid line linkage to Gross Profit and the dotted line linkage to Client Satisfaction. The former is an example of an alignment type linkage. The latter is an example of a dependency type linkage.

Objectives that have alignment-type linkages are directly linked to others and directly contribute to their parent objective's status. This solid line represents the rollup of actual values from Gross Profit objective to Dennis.

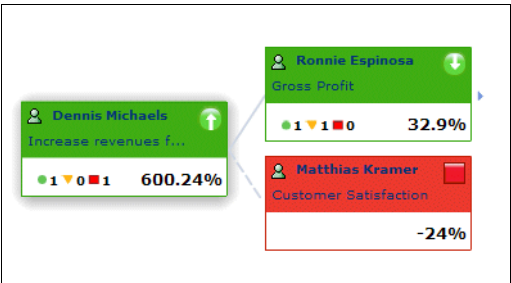


Figure 4-10 Two types of linkages - Alignment and Dependency

The dotted line linkage represents a dependency, where the value of the linked objective does not contribute to the other computationally; instead, they indicate a cause-effect relationship. For example, while the Client Satisfaction objective may not directly contribute to the Increase revenue actual value, it has significant impact on the ability of Dennis to achieve his services revenue objective. Thus, there is an dependency link to this objective, as illustrated by the dotted line.

Dependencies across organizational lines

Your objectives may have dependencies on other objectives both inside and outside your department. For this reason, there is no restriction on who an objective can be linked to. Whether it is a direct report, a matrixed association, a peer, even a superior, you can link an objective to them.

Note: When Workplace for Business Strategy Execution detects linkages that create circular references, an error message will display and you will not be able to create the linkage.

4.3.4 The Navigator

The Navigator is a tool that allows you to quickly access other scorecards in the system. By default, the Navigator displays the organization hierarchy, showing you, your manager, and your direct reports. You can click any one of these names to display their scorecard. The Navigator can also be set up to show other hierarchies, like the department hierarchy or a set of geographies and regions. Each method for navigating is displayed in the Navigator as a new tab. To learn how to configure the Navigator to display different hierarchies, see 8.6, “Navigation, views, and custom hierarchies” on page 170.

4.3.5 Search

The Search component is located below the Navigator on the scorecard screen. You can use search to find people, see details on those people, or view their scorecard. Typing in a person’s name will return basic information about the person, and you can click their name to chat with them or view their scorecard (see Figure 4-11).

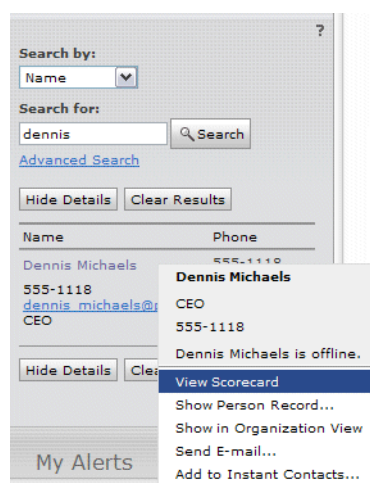


Figure 4-11 The Search component displays results and options

4.3.6 Alerts

Alerts are created for individuals when any one of several events occurs with respect to objectives and initiatives:

- ▶ Receiving a new objective will cause an alert to appear in the individual's alert box.
- ▶ Deleting an objective will also create an alert.
- ▶ When a scorecard is approved, an alert will be created.

Alerts can be marked completed by clicking the alert and choosing **Complete**. This will place a line through the alert (see Figure 4-12).



Figure 4-12 The Alerts component

Users with *edit access* to the scorecard portlet can change the number of days an alert remains on a portlet and the number of alerts displayed by clicking the pencil icon in the upper right hand corner of the portlet. If you do not have edit access, contact your Workplace for Business Strategy Execution administrator.

Figure 4-13 shows the view after clicking edit on the Alerts component.

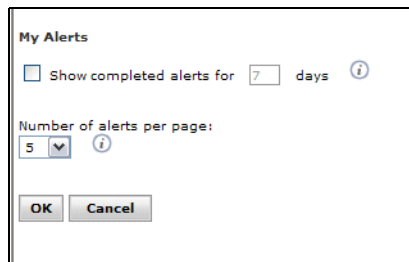


Figure 4-13 The view after clicking edit on the Alerts component

4.3.7 Context menu

The *context menu* is a listing of options that you can take from each objective or initiative (see Figure 4-14 on page 55). The menu is relatively the same from one objective to another. When looking at another person's scorecard, you may find certain options in the menu disabled, like Permissions or Attachments, as you may not have access to edit this type of information.

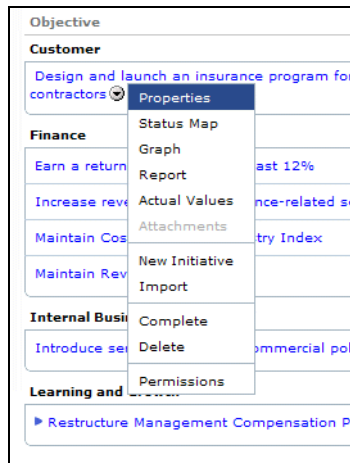


Figure 4-14 The context menu

Properties

Clicking **Properties** takes you to the Target Scheduler, allows you to select data sources, choose linkages and Web resources, and see history of an objective (see Figure 4-15). We will go into depth on Properties in Chapter 5, “Creating objectives, setting targets, and tracking progress” on page 63.

Figure 4-15 The Properties view

Status Map

Choosing **Status Map** brings you to the Status Map visualization, as described in 4.4, “Taking action using the Status Map” on page 58.

Graph view

Clicking **Graph** takes you to a graphical view of the objective, showing targets and reported actual values in one view (see Figure 4-16). This view is similar to the Target Scheduler view, but does not allow editing.

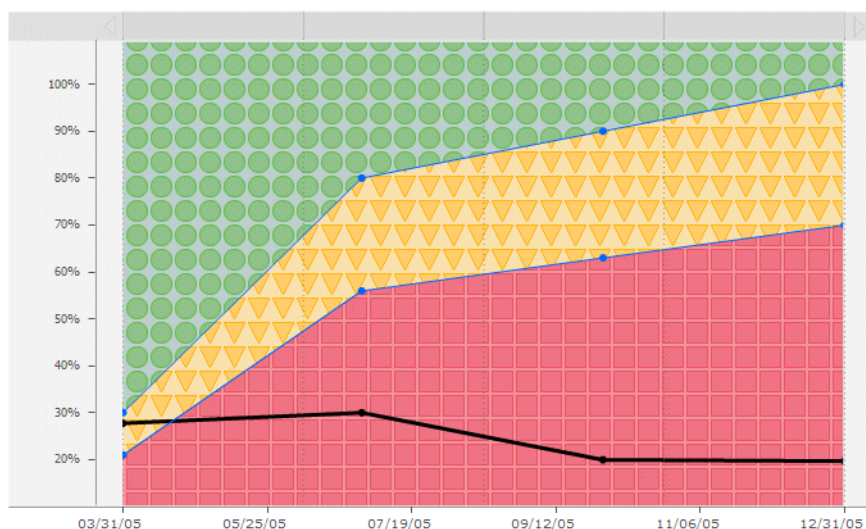






Figure 4-16 The Graph view with the actual values shown (black line)

Report view

The Report view shows a listing of the actual values, the dates associated with the values, and the respective status and trend icons at each value. The report also summarizes the data by percentage of high-performing versus low-performing objectives.

| Date | Actual Value | Target Value | Variance | Status |
|--------------|--------------|-------------------------|----------|---------------------------------------------------------------------------------------|
| Mar 31, 2005 | \$29.75 M | \$34.5 M | -13.77% |  |
| Jun 30, 2005 | \$65.35 M | \$69 M | -5.29% |  |
| Sep 30, 2005 | \$108.52 M | \$103.5 M | 4.85% |  |
| Dec 31, 2005 | \$140.27 M | \$138 M | 1.64% |  |
| Page 1 of 1 | | Total: 4 Displayed: 4 | | |

| State | Percentage | | |
|------------------------------------------------|------------|-------------------------|--|
| Percentage of time reporting positive status | 50% | | |
| Percentage of time reporting moderate status | 50% | | |
| Percentage of time reporting negative status | 0% | | |
| Percentage of time indicating an upward trend | 0% | | |
| Percentage of time indicating a level trend | 0% | | |
| Percentage of time indicating a downward trend | 0% | | |
| Page 1 of 1 | | Total: 6 Displayed: 6 | |

Done

Figure 4-17 The Report view

Actual Values

The Actual Values option shows a listing of actual values, allows you to add new actual values, edit the current values, or delete previous actual values. On another person's scorecard, however, you may edit their actual values only if the owner's settings permit it.

Attachments

Choosing **Attachments** opens the Portal Document Manager, where you can store documents associated with your scorecard. The documents are organized by person. A folder with the end user's name will appear in the manager, and any new attachments will be added in this folder.

New Initiative

To create a new initiative, select **New Initiative**. Then you can create a new initiative as a child to the objective.

Import

Use Import if you wish to import actual values from a spreadsheet. See "Manually recorded data" on page 75 for details on importing from spreadsheets.

Market Dashboard

The Market Dashboard is a custom created menu where a user can add a link from an objective or initiative to another page. This is described in more detail in 4.5, "Linking objectives and initiatives to resources" on page 60.

Complete

When you have finished an objective and no longer wish to see it on the scorecard, choose **Complete**.

Delete

When you wish to remove an objective completely from your scorecard, choose **Delete**.

Permissions

You can grant access to selected individuals to view your scorecard or individual objectives and initiatives. You can also revoke access to your scorecard for selected individuals. There are different roles you can give to users, such as Delegate or Administrator. These are explained further in Chapter 5, "Creating objectives, setting targets, and tracking progress" on page 63.

4.3.8 Other options from the scorecard

At the top of the scorecard, you will notice several buttons.

New Objective

Use New Objective to create new objectives in your scorecard. See Chapter 5, "Creating objectives, setting targets, and tracking progress" on page 63 for the steps to create a new objective.

Submit for Approval

Your scorecard is in draft mode until it is approved by your approver. By default, the approver is your manager. The administrator of your system can change the designation of your approver. You can also modify your designated approver in the permissions setting of your scorecard, or grant different individuals approver rights to different objectives.

Expand All

If you have initiatives on your scorecard, clicking **Expand All** will display all the initiatives.

Import

Click **Import** if you wish to import data into your scorecard from a spreadsheet. You can import spreadsheet data for an entire scorecard or an individual objective or initiative. See “Manually recorded data” on page 75 for details on how to do this.

Permissions

You can grant access to certain people to view your scorecard or individual objectives and initiatives. You can also revoke access to people. There are different roles you can give to users, like Delegate or Administrator. These are explained further in Chapter 5, “Creating objectives, setting targets, and tracking progress” on page 63.

4.4 Taking action using the Status Map

The Status Map is a diagram that shows a particular objective and the status of all the objectives contributing to it. Using the Status Map, you can choose an objective and drill down on the objective to further expand the map. The objectives that are shown as linkages with solid lines are being rolled up to represent the status for the overall objective. When you create a new objective, you can specify how you want that rollup to occur, whether it be adding the objectives together, averaging them, taking a minimum or maximum, or weighting the objectives.

By showing the person responsible and the objective’s status, you have a quick way to look for problem areas. In Figure 4-18, Dennis’ objective is red. He can use the Status Map to identify the areas that are causing it to be red. He drills in on an objective to find the root cause of the low performing objective, in this case, Maggie’s expense objective. Users can choose to look for specific details, like “Show only red objectives” or “Show only alignment type linkages” by toggling the two drop-downs at the top of the map.

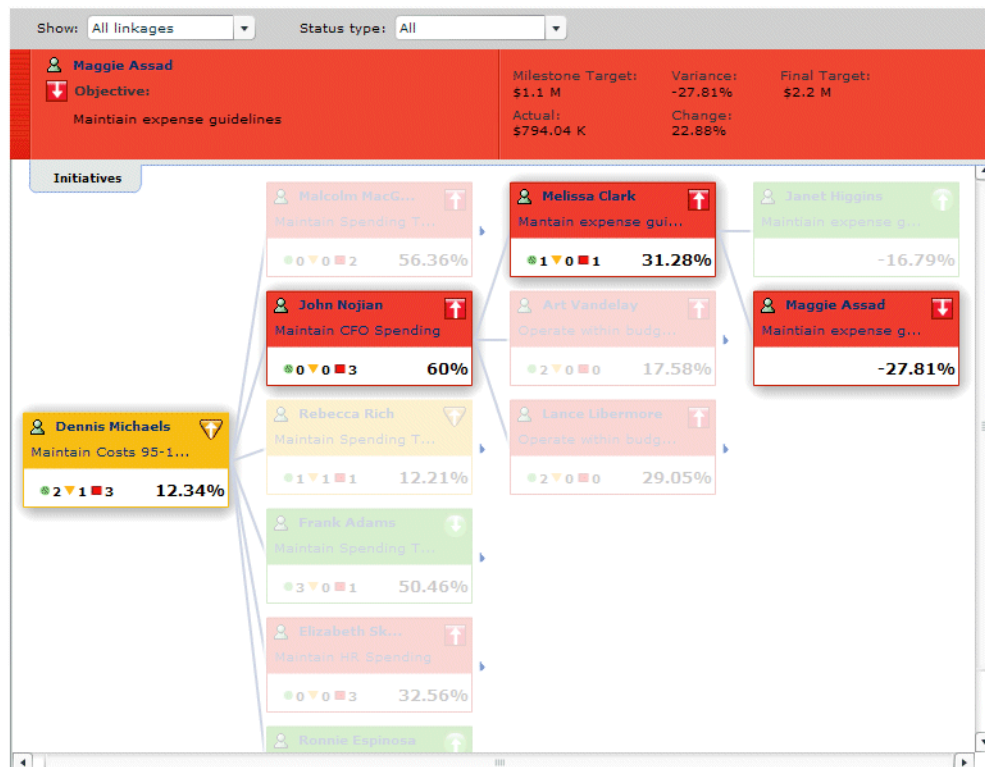


Figure 4-18 The Status Map

It is important to know which objectives are red and performing poorly, but it is also important to know what is being done to remediate the poor performance. This can help assure objective owners that a plan is in place to get an objective back on target, or help identify objectives that need more attention. The Status Map can identify the initiatives that are in place to achieve an objective, as shown in the expanded tab at the top of the Status Map in Figure 4-19. This drop-down shows the initiatives Maggie has put in place to achieve her objectives and also shows the status of those initiatives.

The Status Map is a useful tool for exploring objectives, initiatives, and their linkages. While you may use the Status Map to identify issues in your organization, you can also use the map to take action while you are attempting to understand an issue. From the Status Map, you can also collaborate, choosing to chat or e-mail with the owner of an objective. You can also:

- ▶ Look at information related to the objective
- ▶ Go to the owner's scorecard
- ▶ View a graph of the objective against its targets
- ▶ View a report of the actual values of the objective and the status for each value
- ▶ Open attachments to an objective

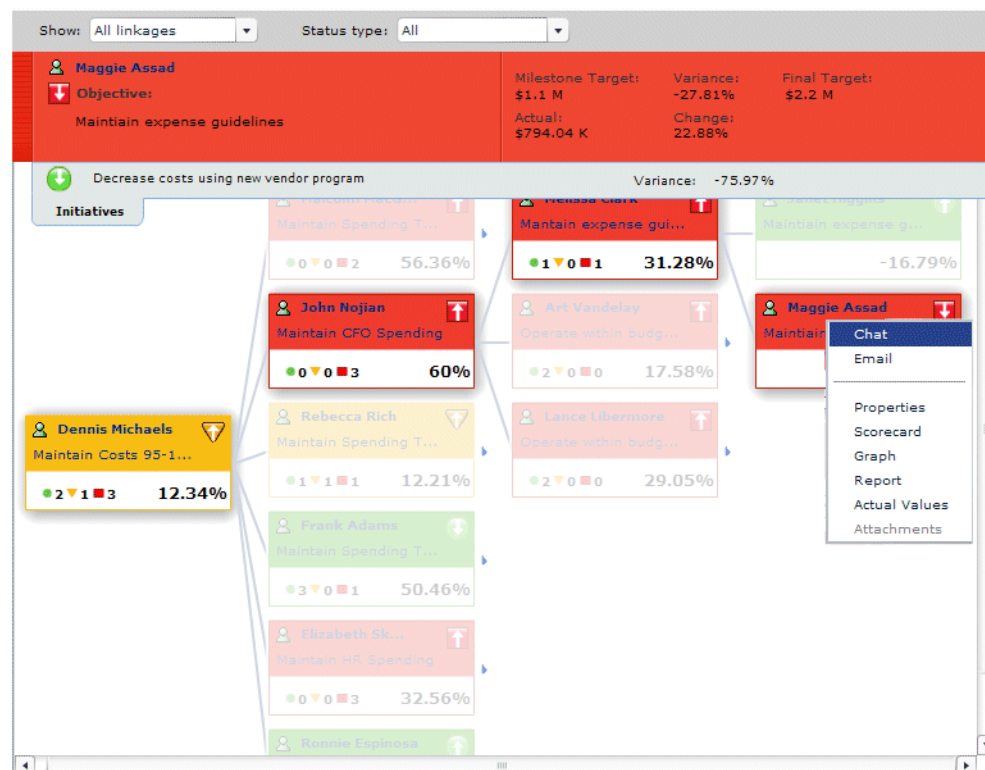


Figure 4-19 The Status Map, showing initiatives and collaboration

4.5 Linking objectives and initiatives to resources

In Workplace for Business Strategy Execution, every objective and initiative can be linked to a *Web Resource*. Web resources can include:

- Dashboard pages
- Team Space pages
- Any portal page
- Intranet Web pages
- External Web pages

Web resources are linked to objectives or initiatives through their menu. When you click an objective or initiative, a context menu will appear that shows options you can take from the objective or initiative (see 4.3.7, “Context menu” on page 54 for more detail). Mostly, the menus are similar from one to another.

There is one variable item, however, that may or may not appear in the menu. That is the link to the Web resource. When setting up an objective or initiative, a user can specify what resource they want to link to and what name they wish to give that resource. In the example in Figure 4-20, we see that “Sales Dashboard” has been added to the menu. Clicking this link will take us to the Sales Dashboard page.

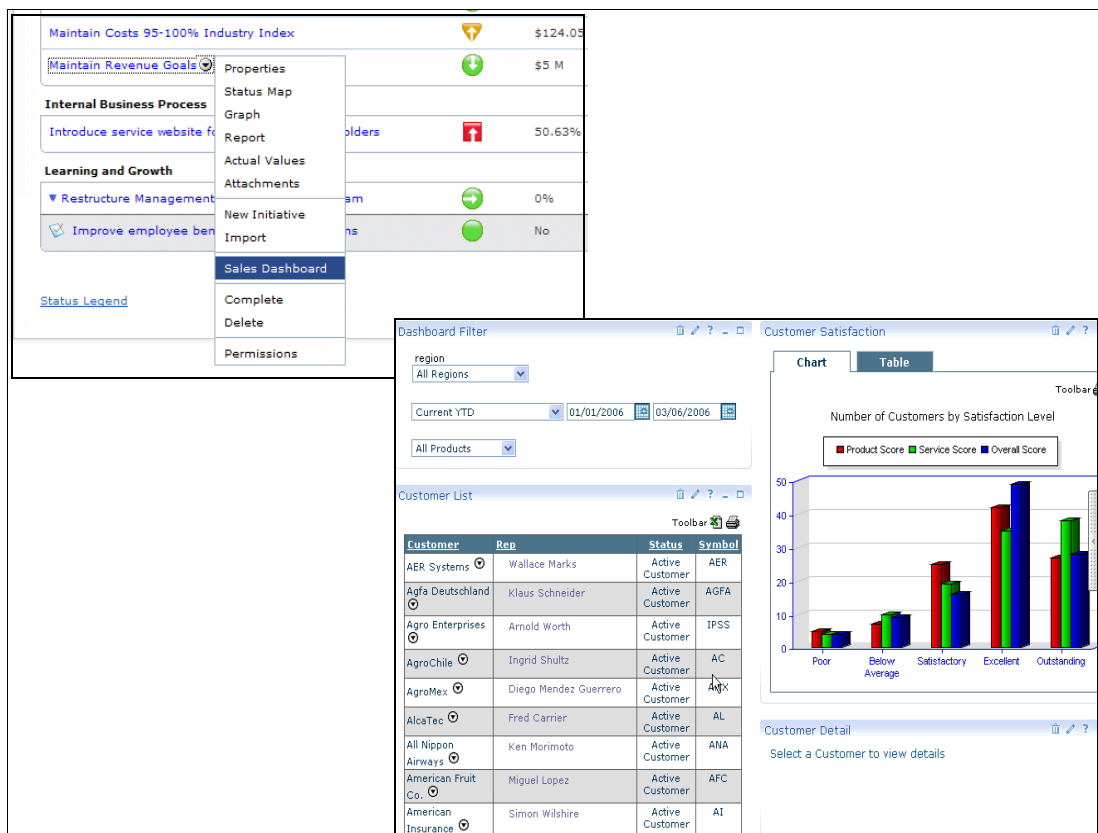


Figure 4-20 Result of selecting “Sales Dashboard” from the menu

Tip: *Team Spaces* are available in the Workplace for Business Strategy Execution Team Edition and are another popular Web resource for objectives and initiatives. A Team Space can be created to help resolve or kickoff an objective or initiative. Team Spaces can include any number of portlets aimed at a specific context. For example, you may have a “Marketing Events” Team Space linked to a “Grow Market Share” objective. In this Team Space, you can:

- ▶ Add members who are linked to the objective
- ▶ Find experts who can help resolve situations
- ▶ Use Portal Document Manager to store related documents
- ▶ Keep track of team tasks
- ▶ Host a discussion forum or chat room

Just like dashboard pages, Team Spaces need to have a unique name set by an administrator in order to appear as a resource that can be linked. Every time a new Team Space is created, it will automatically receive a custom unique name, often a combination of letters and numbers. We recommend against changing this unique name, as doing so may cause difficulty in accessing the Team Space.

To create a Web resource, the user can go to the properties for the objective, and select a resource on the **Web Resource** tab. In Figure 4-21, we see that the user selected **Portal Resource** to link to another portal page. In this example, they chose the page called Dashboard Page. The drop-down box will list any portal page with a Custom Unique Name. To learn more about how to list a page as a custom unique name, refer to 8.9, “Dashboard administration” on page 186. If the user chooses to link to an external resource, they simply type the URL of the resource into the field. Finally, the user gives the resource a name, which is displayed in the objective or initiative menu.

Properties for Improve Customer Satisfaction

Basic Settings Targets Data Source Linkages Web Resource History

☐ No resource

☒ Portal resource:

Page: DashboardPage ⓘ

☐ External resource:

Link: http:// ⓘ

* Resource name: Customer Dashboard ⓘ

* Required field

OK Cancel

Figure 4-21 Setting up a Web resource for an objective



Creating objectives, setting targets, and tracking progress

This chapter describes how to set up objectives and initiatives. In this chapter, we will explore ways to set targets and track the progress of initiatives to prepare you for the design and use of scorecards and dashboards, two key features of Workplace for Business Strategy Execution.

Included in this chapter are the following topics:

- ▶ Setting up objectives and initiatives
- ▶ Using the target scheduler
- ▶ Objective and initiative scenarios illustrated with our two organizations

5.1 Creating a new objective or initiative

To begin creating new objectives on your scorecard, click **New Objective** button in the upper left hand side of your scorecard to bring up the basic information screen for the objective, as shown in Figure 5-1. To create a new initiative, click an objective. This will bring up its context menu. Choose **New Initiative** from the menu. This will also bring you to the basic information screen for an initiative.

The process of creating an objective is the same as that for creating an initiative. Both can have targets, linkages, data sources, and resources. After clicking **New Objective** or **New Initiative**, the window for creating objectives appears (Figure 5-1). This section describes the fields and options on this window.

Important: The names used in our scenarios are the same names you will find in the Sample Data. However, the objectives are not the same; even objectives with similar titles to those in the sample data are different. They have been created to represent the two example companies, and you will not find these examples in the sample data.

New Objective for Ronnie Espinosa

Create an Objective
The **Objective name** you specify appears in your scorecard and is associated with a **Perspective**.

* **Objective name:**
Achieve Revenue Goals *i*

Description:
i

Perspective:
Finance *i*

Value type:
Currency *i*

Milestone:
Monthly *i*

* **Beginning value:**
343000 *i*

* **Target value:**
1253988 *i*

* **Required field**

OK **Cancel**

Figure 5-1 The window for creating a new objective or initiative

In Figure 5-1, Ronnie Espinosa, the Executive Vice President (EVP) Agency for ITSO Insurance, is creating a new objective on her scorecard. The objective is to Achieve Revenue Goals. As the EVP Agency, Ronnie's role is to drive sales in her organization. With this objective, she can track her team's performance on the objective.

Note: On the New Objective and other windows, clicking the symbol that looks like an "i" in a circle will open a window with in-context information for the user.

5.1.1 Initial data for each objective and initiative

Creating a new objective begins with some straightforward fields for you to fill in:

- ▶ Name
- ▶ Description
- ▶ Perspective

After typing in a name and description, select a perspective from the drop-down box. This box contains perspectives that have been set up by your Administrator. Perspectives act much like categories, and they are used to organize your scorecard. In Ronnie's example, she has chosen **Finance** as the perspective that best categorizes her sales objective.

The next set of fields are used to help define and assess targets. When you first create any objective or initiative, you define the type of target, the frequency with which progress is tracked, and the beginning and ending values of the target. Targets allow you to monitor the status of your objectives and initiatives and to identify trends. All these variables will provide a basis for knowing when an objective or initiative has been achieved and what level of progress has been made at specified intermediate points.

This section explains the alternatives available and steps to define each of the variables for a target:

- ▶ Value Type
- ▶ Milestones
- ▶ Beginning Value
- ▶ Target Value

Value Type

As discussed in 1.3.2, "Framework 2: the Balanced Scorecard" on page 6, most organizations will have at least some non-financial targets whose achievement is not measured in financial quantities. There are four Value Types for targets in Workplace for Business Strategy Execution:

- ▶ Currency: For any financial quantity, such as dollar sales volume or expenses.
- ▶ Number: For any quantity, other than currency or percentage, such as unit sales volume.
- ▶ Percentage: For targets expressed as percentages (for example, market share or Return on Equity) or for a target to be measured as percentage of completion.
- ▶ Boolean: Used with objectives for which the target is *completion* or achievement of a new position or state. Often Boolean is used to represent a subjective assessment. The Boolean target can be either Yes or No.

To choose the Value Type, on the scorecard screen, click **New Objective**, and make your choice from the **Value Type** drop-down menu. The default Value Type is Currency.

Ronnie has chosen to track this objective as a currency, as she will be looking to see the dollar amount of sales closed for each of her teams.

Milestones

Milestones designate the time intervals at which the actual values are to be tracked. The Target Scheduler sets up a series of dates on which actual values are to be compared with the intermediate target values for those dates.

From the Milestone list, select the frequency with which values are tracked for an objective or initiative. The default selection is Monthly. The full list of selections available is:

- ▶ Daily
- ▶ Weekly
- ▶ Bi-weekly
- ▶ Monthly
- ▶ Bi-monthly
- ▶ Quarterly
- ▶ Semi-Yearly
- ▶ Yearly

Milestones are displayed the scorecard view and in the Target Scheduler. The scorecard displays the next milestone target, so you can keep track of the next goal you are aiming to achieve. In the Target Scheduler, milestones are shown for the life of the objective. All future milestones can be changed to reflect changes in the targets and plans.

Tip: You can choose a milestone interval that is different than the interval actual values will get updates. Milestones are used to determine target dates, but you can certainly choose to update your data more frequently.

Ronnie has chosen monthly, as she needs to report overall status of her team's sales to her manager, Dennis, on a monthly basis.

Beginning Value

Beginning Value is the value at a designated start point, meaning the date on which the objective or initiative was created. The date associated with the beginning date is designated at the point the objective is created.

Type in the Beginning value as the starting value for your objective or initiative. The default for Beginning value for Currency, Number, and Percentage is 0. For the Boolean Value Type, the default is No.

At ITSO Insurance, since Ronnie is beginning this objective while sales are already underway, she will choose the current sales figures, \$343,000, as the starting value.

Tip: Beginning Value is also used as the start target point on the Target Scheduler. If you are going to be creating a horizontal target, for example, wanting to be consistently at 95% client satisfaction, enter the same number for beginning and target value. This will make it easier to set up your targets.

Target Value

The Target Value is the value at which the objective is achieved. As such, it is the value assigned to the target date.

Type in a Target value as the ending value for this objective. For Currency and Number Value Types, the default is 500000. For Percentage, the default is 100, and for Boolean, the default is Yes.

For ITSO Insurance, Ronnie's goal is to drive \$1,253,988 in sales this year, so she enters this number into the field.

5.1.2 Changing current settings

You can change the name, description, perspective, or milestone frequency for an objective or initiative. Only the Value Type cannot be changed after the objective or initiative was first created.

To modify the current settings of an objective or initiative:

- ▶ Click on the objective or initiative's name in the scorecard to bring up the context menu.
- ▶ Select **Properties** from the context menu.
- ▶ On the **basic settings** tab, make the necessary changes to the objective or initiative.
- ▶ Click **OK** to save the changes or **Cancel** to discard the changes.

5.2 Modifying properties on an objective or initiative

Once you set up the basic information laid out in Figure 5-1 on page 64, the next step is to add the full details of the objective, including:

- ▶ Setting the targets
- ▶ Determining the source of data
- ▶ Establishing linkages
- ▶ Associating resources

To set up this information, you need to open the Properties view of the objective. This can be done by clicking the objective in the scorecard and choosing **Properties** from the list. You will then see a series of tabs with details on the objective. We discuss these tabs next.

5.2.1 Basic Settings

Basic Settings refers to the basic information about an objective you entered when you created the objective. You can modify the information you set up in this tab with the exception of the Value Type field.

Important: You cannot change the Value Type of an objective after you create it. If you need to change a value type, you will have to recreate the objective. See 5.6, "Making modifications to objectives and initiatives" on page 88 for more information about what cannot be modified in objectives.

5.2.2 Setting targets with the Target Scheduler

The next tab is the Targets tab, and it contains the Target Scheduler. Having defined targets for all objectives and initiatives, you can quickly and easily review objective and initiative status in relation to those targets within a graphical interface by accessing the Target Scheduler, which provides the following features:

- ▶ A graphical display of the interim target milestones for your objective or initiative.
- ▶ A graphical display of the current and past actual values.
- ▶ *Status zones* that you can create for quickly identifying project trends and project performance. These zones highlight the relationship between target milestones and your actual data.

Use the following steps to access the Target Scheduler for an objective or initiative:

- Click the objective or initiative's name in the scorecard to bring up the context menu.
- On the context menu, click **Properties** and then the **Targets** tab.

The Target Scheduler appears (see Figure 5-2).



Figure 5-2 Overview of the Target Scheduler

The following are the features of the Target Scheduler, keyed to the numbers on Figure 5-2:

1. **Milestone Targets:** The blue dots on the boundary between the green and yellow zones are the target values for the objective as of the calendar dates shown on the x-axis. These target points can be moved by dragging and dropping them or entering specific values for the points, as explained in “Changing the shape of lines on the Target Scheduler” on page 72. Dragging the dots will only modify the individual dot you are dragging.
2. **Status Palette:** The color icons on this palette can be dragged onto the main graph to change the color in a zone.
3. **Status Zones:** The colors of the three zones provide a visualization of the status of actual values, when they are reported. Actual values falling in the green (positive) zone are better than milestone targets; actual values that appear in the yellow (moderate) zone are worse than milestone targets; and actual values in the red (negative) zone are much worse than target.
4. **Point Value:** This input field can be used to specify an exact value on any status zone line for a particular milestone date. To enter a new point value, click a milestone point, enter a value in the input box, and click **Apply**.

5. **Templates:** Templates can be used to reshape the curve of milestones and lines on the Target Scheduler. Using a template will modify all of the dots on the graph: those on the green/yellow line and those on the yellow/red line.
6. **Last Target Date:** Objectives are set to end at the end of the current calendar year by default. To change the end date, enter the new date here using MM/DD/YY as the format and click **Apply**.
7. **Y-Axis:** The scale on the y-axis corresponds to the value type (\$, %, number or boolean) chosen on the New Objective screen. If you change a milestone point beyond the range shown on the y-axis, the y-axis will automatically rescale to show the new position of the milestone point. This will also rescale all the points on the graph.
8. **New/Delete Line:** You can add or remove new lines from the graph to create target zones.

Last Target Date

As circumstances or a deadline changes, you may need to change the end date for an objective or initiative on your Target Scheduler. *Last target date* refers to the target date that the objective or initiative is scheduled to be completed.

Use the following steps to change the objective or initiative end date:

- ▶ Enter the new end date for your objective or initiative in the Last target date field in MM/DD/YY format.
- ▶ Click **Apply**.
If the new target date falls beyond a target milestone interval, a window labelled Confirm will open, listing the new target milestone dates and asking you to confirm that the new dates will be added to the Target Scheduler.
- ▶ Click **OK**.

For example, if a Last target date of 12/31/06 is changed to 01/31/07, and the Milestone's setting is bi-weekly, two new milestone dates will be added to the target Scheduler: 01/14/07 and 01/28/07.

Otherwise, if you click **Cancel** in the Confirm window, the target date will remain the same as the Last target date, and the new date will not be adopted by the Target Scheduler.

If a target date is changed, Workplace for Business Strategy Execution does *not* automatically modify the milestone values.

- ▶ If the new target date is *later than* the last target date, the milestone values for the new target date are equal to the values for the last target date, and the values for the previous target date are not changed.
- ▶ If the new target date is *earlier than* the last target date, the milestone values for the new target date are equal to the values for the previous target date, and the values for the preceding milestone dates are not changed.
- ▶ You can change the values for any preceding milestones *manually*, as discussed in "Changing the shape of lines on the Target Scheduler" on page 72.

Note: On the Target Scheduler graph, the horizontal axis displays dates at least five regular intervals between the start and target dates. Those dates are not necessarily milestone dates for the objective or initiative.

Milestone points

The rules for adding new milestone points depend on the reporting frequency chosen on the New Objective window:

- ▶ **Daily:** You can add milestone points on any day, including Saturday and Sunday.
- ▶ **Weekly:** You can add milestone points on Saturdays only. For example, if you extend an objective set to end on 12/31/05 by a week, you must extend it to 01/07/06. If you choose a date between 01/01/06 and 01/06/06, the new milestone will be added.
- ▶ **Monthly:** Milestone points needed to be added for the last Saturday of the month. For example, if the objective is going to be extended to 01/31/06, the milestone point will be added at 01/28/06, which is a Saturday.
- ▶ **Bi-Monthly:** This milestone uses the last day of the month, for example 02/28/06 and 04/30/06.
- ▶ **Quarterly:** The quarters are determined by the financial year set up by the administrator. By default, the quarters are 03/31, 06/30, 09/30, and 12/31.
- ▶ **Semi-Yearly:** Uses 06/30 and 12/31 as milestone points.
- ▶ **Yearly:** Uses 12/31 as the only milestone point in a calendar year.

If these rules are not followed, the new milestone point will not be added.

At ITSO Insurance, Ronnie is going to leave the sales objective on the default last target date of 12/31.

Templates

The template choice provides the general shape for all lines on your Target Scheduler. You can select a new template by clicking on a template icon with the appropriate generic shape.

The beginning and target values for an objective or initiative determine the templates available to you. Depending on the relationship between the beginning and target values of your objective or initiative, you can select from the following templates:

- ▶ Beginning value is less than or greater than your target value (see Figure 5-3).



Figure 5-3 Templates available when beginning value is not equal to target value

- ▶ Beginning value is equal to your target value (see Figure 5-4).



Figure 5-4 Template available when beginning value is equal to target value

At ITSO Insurance, the majority of sales close at the end of the year. To reflect this basic seasonality, Ronnie selects the third template shown in Figure 5-3.

Note: When you select a new template, all lines on the target scheduler are affected, except the actual value line. The shape of the actual value line is not affected by selecting a different template.

Status zones

From the initial data for an objective or initiative, the Target Scheduler generates a graph divided into areas shaded with three colors. If the beginning value is greater than the target value, the graph will look similar to Figure 5-5. If the beginning value is less than the target value, the red and green areas are reversed.

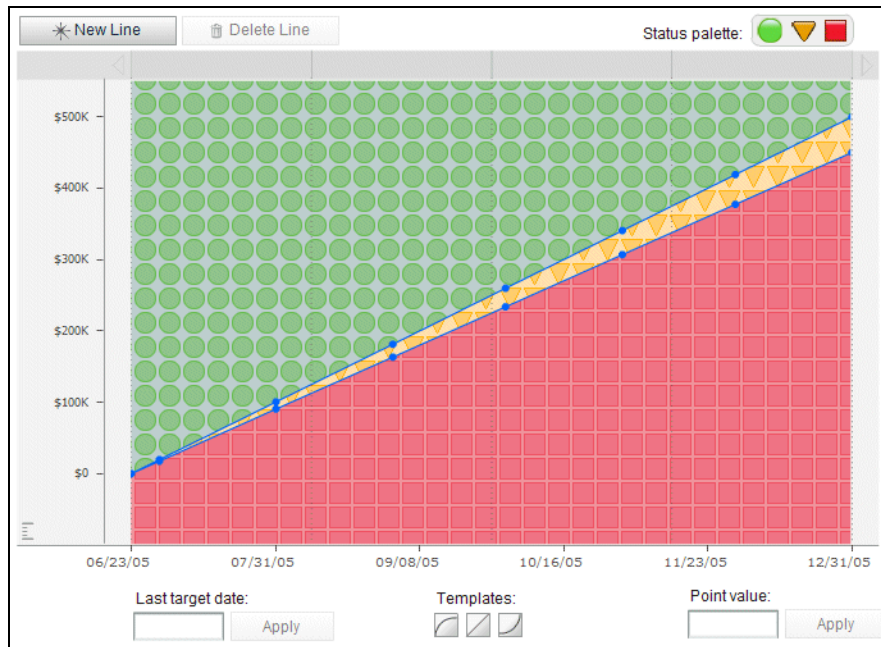


Figure 5-5 The Target Scheduler lays out straight line zones by default

These areas are called *zones*, and their boundaries are called *zone separator lines*. By default, two types of zone separator lines appear on the Target Scheduler:

- ▶ The *target line* is generated from the beginning and target values you supply when creating your objective or initiative.
- ▶ The *threshold line* is generated from plotting values that are 90% of your target milestone values.

The Target Scheduler uses three colors to denote the status of actual values reported:

- ▶ Green, the *positive* zone, fills the area that is better than the target line. For many objectives, such as sales volume, you will want the green area above the target line.
- ▶ Yellow, which is the *moderate* zone, fills the area between the target and threshold lines, denoting actual values that are below the milestone target values.
- ▶ Red, the *negative* zone, fills the area that is significantly worse the milestone target values. For many objectives, such as sales, the red zone is below the threshold line, but for other objectives, such as for an expense ratio, it might be above the threshold line.

By examining where your actual data falls within the zones, you are able to determine the current status in relation to the target at a quick glance.

You can customize your Target Scheduler by adding or deleting lines on the graph, including the default lines, to create your own zones. You can also use the Status palette to define the status of your zones.

Adding and deleting lines on the Target Scheduler

This section describes how you can add or delete lines to create your own zones on the Target Scheduler.

Note: You cannot add or delete lines once actual values exist.

- ▶ Adding lines: You can quickly and easily add lines to your target schedule to create zones by clicking **New Line**.

Note: New lines are placed above the last line modified. You can place a new line above a line already present on your target scheduler by clicking on a specific line and clicking **New Line**.

- ▶ Deleting lines: You can also delete lines as appropriate to remove zones. Perform the following steps to delete a line from your Target Scheduler:
 - To select a line to delete, click a line. You can hold down the Shift or Control key to select multiple lines at once.
 - Click **Delete Line**.

Note One line must be present on your target scheduler. When only one line is present, the Delete Line button is disabled.

In the case of ITSO Insurance, Ronnie needs the three default zones in green, yellow, and red, so she does not modify the zones.

Changing the shape of lines on the Target Scheduler

The shape of lines on the Target Scheduler can be changed in three ways:

- ▶ Selecting a new template: A template provides the shape for all lines on your target scheduler. You can select a new template by clicking a template icon with the appropriate shape.
- ▶ Dragging and dropping: Click any milestone points on the graph and drag it to a new position. When you drop it, the line will be redrawn to include the new position of the point.
- ▶ Entering new point values: If you hover over a point on the graph, its value will appear in the Point value box below the graph. A new value can be entered in that box, and the line will be redrawn to include the new position of the point.

At ITSO Insurance, Ronnie knows that sales are more likely to close in the end of the year, so she uses the third template to adjust her curve, showing a spike in the end of year sales, as shown in Figure 5-6 on page 73.

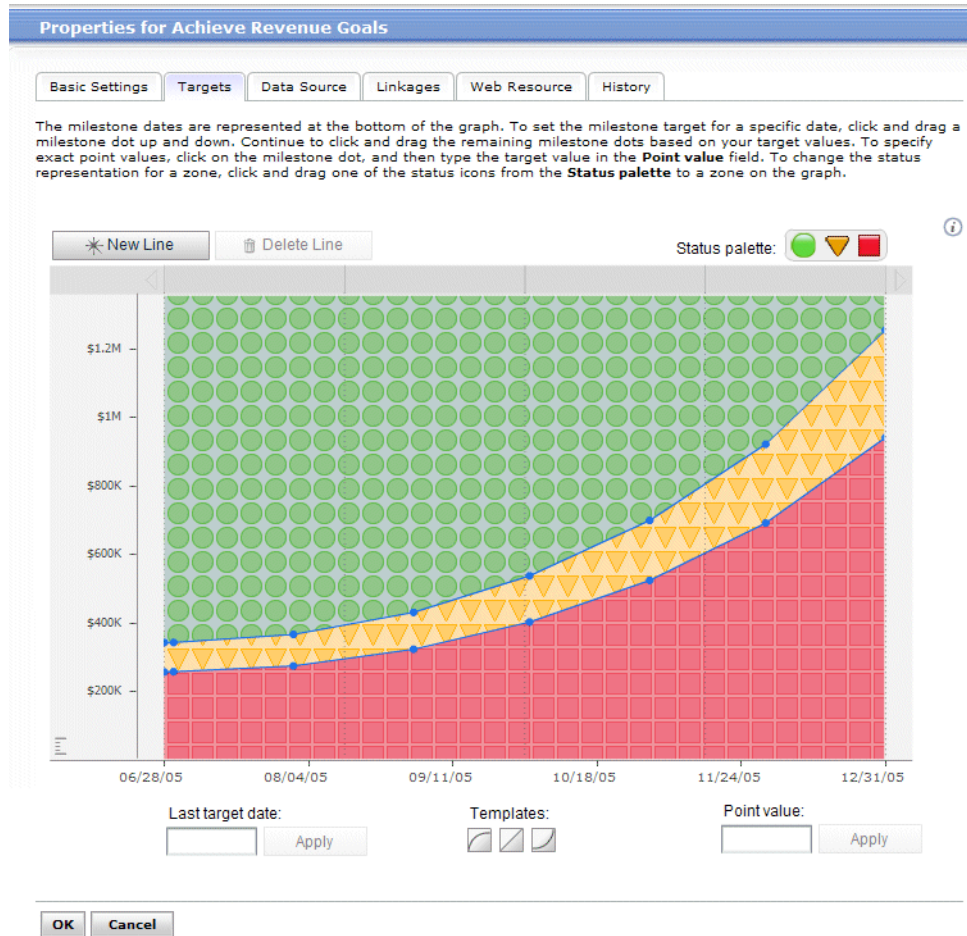


Figure 5-6 Setting Targets - ITSO Insurance

Changing the status of zones on the Target Scheduler

Zones are regions on the Target Scheduler that represent the status of a particular objective or initiative. You can easily change the status of zones on your Target Scheduler using the Status palette, dragging and dropping the appropriate status icon from the Status palette to a zone on the Target Scheduler:

- Click a status icon from your Status palette and continue to hold the mouse key down.
 - Drag the status icon to the appropriate zone on your Target Scheduler.
 - Drop the status icon to the appropriate zone by releasing the mouse key.

Note: You cannot change the status of zones once actual values exist.

Ronnie will not change the color of these zones for her company.

Changing values on the Target Scheduler

You have the flexibility to customize your target scheduler by changing the values of points on target and zone separator lines and by changing the end date of your objective or initiative. This flexibility allows you to view your target milestones more accurately and track the progress of your objective or initiative.

Changing a point value

- ▶ You can change the value of a point on your target or zone separator lines by two methods. You can click a point and drag the point up or down on the graph to modify the value. You can also change the value of a point on your line by entering an exact value. Perform the following steps to enter an exact value for a point:
 - Click on a point to highlight. The current value appears in the Point value field.
 - Enter the new value for this point in the Point value field.
 - Click **Apply**.

Note: You cannot change the target values for time periods that contain actual values.

Changing the end target date

As deadlines change, you may need to change the objective or initiative end date on your Target Scheduler. Perform the following steps to change the objective or initiative end date:

- ▶ Enter the new end date for your objective or initiative in the Last target date field.
- ▶ Click **Apply**.

Changing the view of the Target Scheduler

- ▶ The Target Scheduler allows you to zoom in and out, scroll left and right, and rescale the graph as appropriate to provide you with more control on how you view your targets
 - Zooming in and out
 - Hover over the grey bar above the segment of the graph you wish to examine, to access the zoom in and zoom out features of the Target Scheduler.
 - Click the zoom in (+) or zoom out (-) button, as appropriate.

Note: When there are 10 or fewer data points on the graph, the zoom in button will be disabled.

- Scrolling left or right: You can click the arrow buttons beside the grey bar above the graph, to scroll left or right. You can enable the scrolling feature by using the zoom in feature of the Target Scheduler.
- Rescaling the y-axis of the Target Scheduler: You can rescale the y-axis of the target scheduler by clicking the scale icon at the lower left of the graph.

5.2.3 Data sources for reporting actual values

Objectives and initiatives depend on actual values to determine status and trend. The Data Source tab specifies how actual values are entered into the objectives and initiatives.

There are three primary methods for acquiring data:

- ▶ Record data manually allows the user to log actual values by direct entry or by importing data from an Excel® spreadsheet.
- ▶ Aggregate from alignment specifies that the actual values are rolled up from other objectives and initiatives.
- ▶ Acquire from external source specifies that the actual values are pulled in from an external data source using a Web Services Description Language (WSDL) file.

To specify the data source for an objective or initiative:

- ▶ Hover over the objective or initiative name in the scorecard, and click the arrow to bring up the context menu.
- ▶ Select **Properties** from the context menu.
- ▶ Click the **Data Source** tab.
 - To record data manually, click **Record data manually**.
 - To aggregate from aligned linkages, click **Aggregate from alignment**, then select the calculation method for aggregation from the list. If you want to establish linkages to this objective, this option must be selected.
 - To acquire actual values from an external source, click **Acquire from external source**, then select the data source from the list. If the data source requires input parameters, type the parameters in the appropriate fields.
- ▶ Click **OK** to save the data source selection or **Cancel** to discard any changes.

Note: Eligible data sources are defined by an administrator. Contact the administrator responsible for configuring the data source for the valid parameters.

For more information about data sources, see Chapter 7, “Data sources” on page 127

Manually recorded data

Manually recorded data can be entered in two ways:

- ▶ Keying in the actual data
- ▶ Importing the actual data from an Excel spreadsheet

Note: Actual values can only be logged manually if the objective or initiative is set to record data manually.

Key-enter actual values

To key-enter actual values:

- ▶ Hover over the objective or initiative name in the scorecard and click the button to bring up the context menu.
- ▶ Select **Actual Values** from the context menu.
- ▶ Type a value, date, and time, and click **Apply** to save the actual value.

To edit logged actual values:

- ▶ Hover over the actual value in the table and click the button to bring up the context menu.
- ▶ Click **Edit**.
- ▶ Update the fields with new values, and click **Apply** to save the values.

To delete logged actual values:

- ▶ Hover over the actual value in the table and click the button to bring up the context menu.
- ▶ Click **Delete**.
- ▶ Click **OK** to delete the actual value or **Cancel** to keep the actual value.

Import actual values from spreadsheet

Actual values can be imported for an objective, initiative, or an entire scorecard. A Microsoft® Excel spreadsheet file is required.

The following formatting guidelines are necessary for importing actual values into a Workplace for Business Strategy Execution scorecard, objective, or initiative. If the following guidelines are not followed, the import may be unsuccessful.

You can import values for an entire scorecard or for an individual objective or initiative. We will go through both scenarios, as the spreadsheets look differently.

Formatting for a scorecard import:

1. Create a new Excel spreadsheet or add a blank worksheet as the first worksheet of an existing workbook.

Notes:

Only columns A, B, and C are used.

Only the first sheet is used for importing, and it can have any name, for example, Sheet1.

The objective and initiative names must match the names displayed in the scorecard and be unique.

An objective or initiative can have multiple rows of actual values imported.

If a date and time is not specified in column C, the system time is used for the actual time.

The date and time must fall in the range between the date and time the objective was created and the present time. The present time is determined by the current local time at your Workplace for Business Strategy Execution server, which is a consideration if the server is located in a different time zone. An import of an actual value date and time outside that range will not succeed.

2. For each row:
 - a. Type the actual value in column A or reference another cell in the workbook that contains the actual value.
 - b. Type the exact objective or initiative name in column B.
 - c. To specify a date and time to associate to that actual value in column C, type the date and time in the following format: mm/dd/yyyy hh:mm AM or PM.
 - d. Right-click the date and time cell and select **Format Cells**.
 - e. On the Number tab, select **Date** in the Category list.
 - f. Click **OK** to save the date and time format.

Note: If Excel changes the format of the cell, it is not a problem. When you highlight the date and time cell in column C, the date and time appears in the formula bar.

3. Repeat step 2 on a new row for each additional actual value to import.
4. Save the spreadsheet.

Figure 5-7 on page 77 shows the format for an Excel import for more than one objective.

| | A | B | C |
|---|---------|----------------------------|---------------------|
| 1 | 4 | Grow Market Share | 01/31/2006 12:00 PM |
| 2 | 91 | Increase Customer Satisfac | 01/31/2006 12:00 PM |
| 3 | 4500000 | Achieve Revenue Goals | 01/31/2006 12:00 PM |
| 4 | 1000000 | Gross Profit | 01/31/2006 12:00 PM |
| 5 | 3500000 | Maintain Spending Targets | 01/31/2006 12:00 PM |
| 6 | | | |
| 7 | | | |

Figure 5-7 Format for an Excel import for more than one objective

To import actual values into the scorecard:

1. From the scorecard, click **Import**.
2. Type the location of the Excel spreadsheet file, or click **Browse** to find the file.
3. Click **OK** to import the actual values or **Cancel** to return to the scorecard.

Formatting for a single objective or initiative import:

1. Create a new Excel spreadsheet or add a worksheet to the top page of an existing workbook.

Notes:

Only columns A and B are used.

Only the first sheet is used for importing, for example, Sheet1.

An objective or initiative can have multiple rows of actual values imported.

If a date and time is not specified in column B, the system time is used for the actual time.

2. For each row:
 - a. Type the actual value in column A.
 - b. To specify a date and time in column B, type the date and time in the following format: mm/dd/yyyy hh:mm AM or PM.
 - c. Right-click the date and time cell and select **Format Cells**.
 - d. On the Number tab, select **Date** in the Category list.
 - e. Click **OK** to save the date and time format.

Note: If Excel changes the format of the cell, it is not a problem. When you highlight the date and time cell in column C, the date and time appears in the formula bar.

- f. Repeat step 2 on a new row for each additional actual value to import.
- g. Save the spreadsheet.

Figure 5-8 shows the format for an Excel import for more than one objective.

| | A | B | C |
|---|----|---------------------|---|
| 1 | 23 | 01/31/2006 12:00 PM | |
| 2 | 42 | 02/28/2006 12:00 PM | |
| 3 | 53 | 03/31/2006 12:00 PM | |
| 4 | 15 | 04/30/2006 12:00 PM | |
| 5 | 45 | 05/31/2006 12:00 PM | |
| 6 | 87 | 06/30/2006 12:00 PM | |
| 7 | 91 | 07/31/2006 12:00 PM | |
| 8 | | | |

Figure 5-8 Format for an Excel import for one objective

To import actual values into an objective or initiative:

1. Click the objective or initiative name in the scorecard to bring up the context menu.
2. Select **Import** from the context menu.
3. Type the location of the Excel spreadsheet file, or click **Browse** to find the file.
4. Click **OK** to import the actual values or **Cancel** to return to the scorecard.

Note: Importing actual values from a spreadsheet requires Edit access rights.

Aggregate from alignment

For objectives whose status depends on the status of other objectives, the data source is Aggregate from alignment. Similarly, the status of initiatives that depend on other initiatives will depend on the status of those other initiatives.

To establish Aggregate from alignment for an objective or initiative:

1. In your scorecard, access **Properties** for the objective
2. Select the **Data Source** tab
3. Select **Aggregate from alignment**
4. Choose the method of calculation from the drop-down list just below. The available methods of calculation are:
 - Additive: The designated data sources are added together, and the sum is reported as the actual value.
 - Minimum: The lowest value of the designated data sources is the actual value reported.
 - Maximum: The highest value of the designated data sources is the actual value reported.
 - Average: The average of the designated data sources is the actual value reported.
 - Weighted: The weighted average of the designated data sources is the actual value reported. The weights are percentages (which should add up to 100%) that you enter in a window that opens when this method of calculation is selected.

At ITSO Insurance, Ronnie is dependent on her team making their sales targets to meet her target. Thus, she will take her objective and link it to each member of her team. She specifies

Aggregate from Alignment and Additive as the method to roll up data. Now, when each of her sales units updates values, the number will also update in her scorecard.

Note: The owner of an objective must select **Aggregate from alignment** as the source for reporting actual values before the objective can be pushed to another person's scorecard.

External sources

You can choose to obtain actual data from external sources, which means that actual data will be pulled from a Web Services Description Language (WSDL) file that you specify.

A Workplace for Business Strategy Execution administrator must previously establish the set of WSDL files that are eligible for use as an organization's actual Workplace for Business Strategy Execution data sources. Chapter 7, "Data sources" on page 127 discusses how to set up the files that can serve as external sources for Workplace for Business Strategy Execution reporting.

If you plan to use a data source to acquire external data from a Web service, there are guidelines that must be followed specifically for the WSDL file. There are many parameters that can be specified in a WSDL file, but IBM Workplace for Business Strategy Execution does not support all parameters. See Chapter 7, "Data sources" on page 127 for the supported parameters necessary when using a WSDL file as your means for data acquisition.

5.2.4 Establishing linkages

Linkages are used to show dependencies and relationships among objectives. There are different types of linkages that can be used in Workplace for Business Strategy Execution, and we review them in this section.

Alignment linkages

Alignment linkages refer to linkages for which actual values are combined. For example, a budget objective may be divided into several smaller objectives, all which contribute to the overall objective. To set up an objective this way, you would choose **Aggregate from alignment** on the Data Sources tab (see Figure 5-9 on page 80). There, you will be able to select what method you want to use to roll the data up (average, additive, minimum, maximum, or weighted average).

Restriction: If you choose to aggregate, you will not need to associate your objective to another data source, as the data source is the other objectives rolling up. Also, you will not be able to enter in actual values manually, as your objective values are determined by the linked objectives.

For more information about how this will be addressed in future releases, see Appendix A, "Looking forward" on page 195.

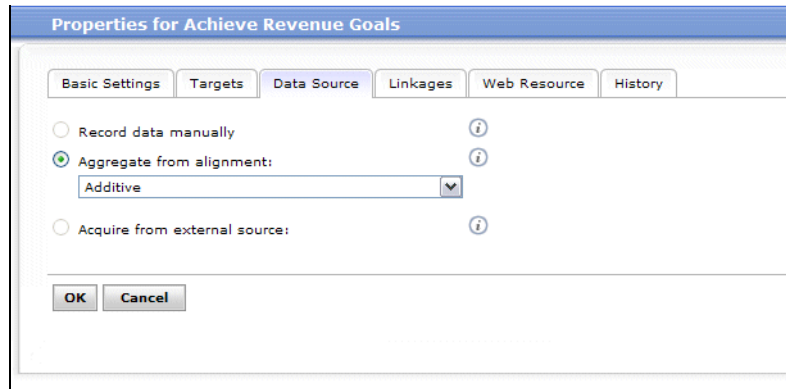


Figure 5-9 Choose Aggregate from alignment as your data source

To establish the linkages, click the next tab, **Linkages**. Here you will have two choices:

- **Push Objective:** Pushing an objective means you will be creating new objectives on the scorecards of the people you link to. The objective name, description, and final target will get pushed to them, giving them a brand new objective.

Important: Milestones do not get pushed with an objective, nor do target zones. The people you push an objective to will only get the final target. If you wish to push milestones with the objective, it is best to use the description box of the objective to let them know the intended milestones. This is a known limitation in Workplace for Business Strategy Execution Version 1.0.

- **Link to Existing Objective:** If you choose this option, you will be able to see the objective on another person's scorecard and will be able to choose the objective you want to link to. In this case, the final target you set and the name you give the objective does not get pushed. From that point on, any actual values added to that objective will begin rolling up to yours.

Important: No previous actual values will roll up when you link to an existing objective. Actual values only added after your objective's start date will roll up.

For either choice, a window will open in which you can search for people to either push the objective to or link to. When pushing, you can search for several people and add them to the objective, much like an e-mail. When linking, you must search for one person at a time, as all of the objectives on their scorecards will be displayed to you.

If pushing, you can change the name, description, or target for each person you push the objective to. Notice that in Figure 5-10 on page 81, the objective is pushed to the same person twice, each with a different value for the name. This may be helpful if one person is responsible for two different objectives that both need to roll up, for example, being responsible for the sales of two different product lines. You can push an objective to anyone, any number of times, including yourself.

Alignment linkages appear in the Status Map with a solid line connecting two objectives.

Properties for Achieve Revenue Goals

Basic Settings | Targets | Data Source | **Linkages** | Web Resource | History

You can push your objective to others or link your objective to another person's existing objective. To push your objective to another person, click **Push Objective**. To link your objective to another objective, click **Link to Existing Objective**. If you push an objective to others, a new objective is created for them with your suggested targets. The new objective is aligned with this objective. If you link to an existing objective, your objective assumes the characteristics of the linked objective, and you need to specify the objective as a linkage type of alignment or dependency.

Aligned to: Dennis Michaels, Revenue

| Objective | Owner | Linkage Type | Target |
|----------------------|--------------------|--------------|--------|
| Revenue | Minh Li | Alignment | \$27 M |
| Revenue | Peter Brown | Alignment | \$25 M |
| Revenue | Raimundo Martin | Alignment | \$10 M |
| Revenue-Direct | Stan Carrow | Alignment | \$65 M |
| Revenue-OEM | Stan Carrow | Alignment | \$40 M |
| Revenue-Direct Sales | Francis Meriwether | Alignment | \$1 M |
| Revenue-OEM Sales | Francis Meriwether | Alignment | \$20 M |
| Deploy Seibel in US | Stan Carrow | Dependency | NA |

Page 1 of 1 Total: 8 Displayed: 8

Aggregation type: Additive
Available for allocation: \$186.12 M

Figure 5-10 Select the names of the individuals who you are linking to and their target

Dependency linkage

A *dependency linkage* refers to a linkage for which values do not roll up. These linkages are useful to show associations among different types of objectives or groups. To establish this type of linkage, use either the **Manual Entry** or **External Data Source** options on the Data Source tab. You can choose **Aggregate from alignment** as the option if you plan to aggregate objectives and show dependencies in the tool.

Important: Actual values are not rolled up from dependency linkages. To link to objectives using this method, you will still need to choose how your objective receives actual values. It is possible to have an objective with both alignment and dependency linkages, but the values reported in the objective with those linkages will come only from the alignment linkages.

To create a dependency link, click the **Linkages** tab. You will have the **Link to existing objective** button enabled. Use this button to search for people and find an objective on their scorecard that you want to create the dependency on.

Dependency linkages appear in the Status Map as dotted lines.

At ITSO Insurance, the training department has been assigned an objective to introduce a new executive sales training program. Stanley Carlow, the senior marketing executive has chosen to link the new training program to Ronnie's Achieve Revenue Goals objective. The training program for all regional marketing managers will contribute to achieving the year's sales target, but the reported values for the training objective will not be rolled up as part of the actual monthly sales volumes. The linkage for the marketing executive's scorecard to the training department head's sales training program is Dependency (see Figure 5-10 on page 81).

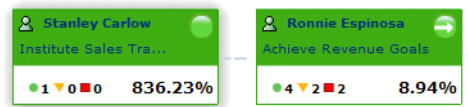


Figure 5-11 Dependency Linkage for ITSO Insurance shown with a dotted line

5.2.5 Choosing a Web Resource

Every objective and initiative can link to a dashboard page, a Web page, or any other portal page. This link appears in the context menu when you click the objective or initiative, much like a bookmark. This is set up on the Web Resource tab in the properties. You will notice three options on this tab: No Resource, Portal Resource, and External Resource. By default, objectives and initiatives have no resource associated to them. Selecting **Portal Resource** will activate a drop-down menu of all the available portal pages you can choose from.

Important: The pages displayed in the Portal Resource list are pages that have Custom Unique Names. An administrator can set up a Custom Unique Name for a portal page. If your dashboard does not appear in the Portal Resource list, you can select External Resource and use the URL to the dashboard page, or contact your Administrator to set one up.

You can also choose an external page, like an Internet or intranet page. You must type in the "http://" in order for the link to work properly.

Finally, give the resource a name. This is the name that will appear in the context menu for the objective or initiative.

Figure 5-12 The Web Resource window

Ronnie has chosen to link her Achieve Revenue Goals objective to her Sales Dashboard (see Figure 5-13 on page 83). This page contains related sales data, including recent bookings,

booking by region, and top opportunities. This particular page was built using the IBM Workplace Dashboard Framework. For more information, see Chapter 6, “Dashboard” on page 103.



Figure 5-13 ITSO Insurance's Sales Dashboard

5.2.6 Viewing history

The history of an objective or initiative contains an entry for each time a property for an objective or initiative was changed, who initiated the change, and what was changed. Other items tracked in the history table include the old and new values.

To view the history of an objective or initiative:

- ▶ Hover over the objective or initiative name in the scorecard and click it to bring up the context menu.
- ▶ Select **Properties** from the context menu.
- ▶ Click the **History** tab.

Note: History entries are permanent and so serve as a kind of audit trail of user-initiated changes to an objective or initiative.

5.3 Reporting progress

This section briefly describes the principal methods of viewing reports on progress for objectives and initiatives:

- ▶ Status Maps
- ▶ Graphs and Reports

5.3.1 Status maps

Each objective or initiative has a corresponding status map. The status map provides a visual representation of linkages and the status of linkages for objectives or initiatives. Using the status map, you can navigate the linkages and easily see which objectives or initiatives are affecting your status positively and negatively.

The status map shows objectives or initiatives as boxes. These boxes contain information such as the owner, name, status, trend, and variance about an objective or initiative. The objective box is linked to other objective boxes that affect status. The initiative box is linked to other initiative boxes that affect status. The number of linkages for an objective or initiative box has is shown in the lower-left of each box; the totals represent the number of positive, moderate, and negative linkages.

The status map has two components:

- ▶ The status banner shows details pertaining to the current objective or initiative selection: the owner, name, status, trend, and metrics.
- ▶ The objective and initiative boxes are a visual representation of objective and initiative linkages and the status of those linkages.

To view the status map for an objective or initiative:

- ▶ Hover over the objective or initiative name in the scorecard and click it to bring up the context menu.
- ▶ Click **Status Map**.

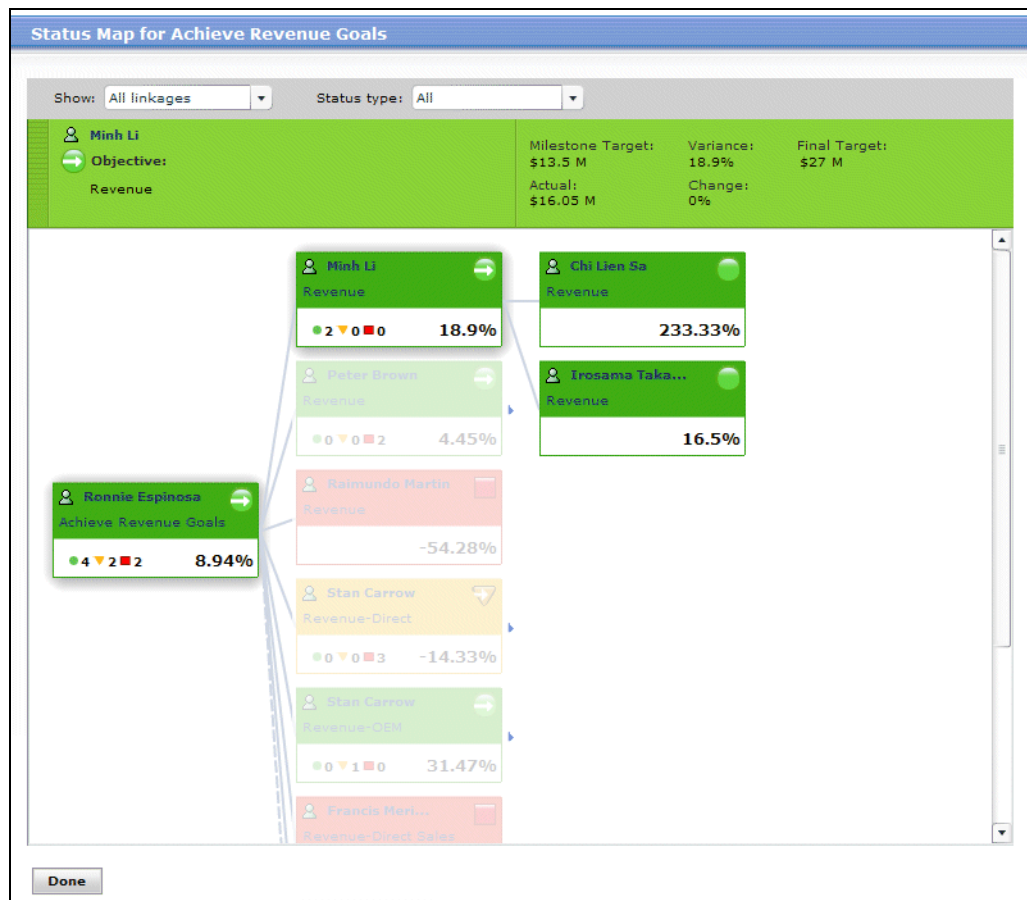


Figure 5-14 Status Map for Ronnie's Achieve Revenue Goals

Note: Once you are viewing the status map for an objective, you can access the status map of an initiative that corresponds to this objective by clicking the initiatives or by returning to the scorecard to access the status map of a specific initiative.

To change which objectives or initiatives are shown in the status map:

- ▶ To show all linkages, click **All linkages** from the Show list.
- ▶ To show only alignments, click **Alignments** from the Show list.
- ▶ To show only dependencies, click **Dependencies** from the Show list.

Note: Dependencies are shown as dotted lines.

To show objectives or initiatives with a certain status:

- ▶ To show objectives or initiatives with any status, click **All** from the Status type list.
- ▶ To show objectives or initiatives with only positive status, click **Positive only** from the Status type list.
- ▶ To show objectives or initiatives with only moderate status, click **Moderate only** from the Status type list.
- ▶ To show objectives or initiatives with only negative status, click **Negative only** from the Status type list.

To navigate in the status map:

- ▶ If an objective or initiative box displays an icon next to it, click the objective or initiative box to expand the linkages out to the right. The status of the selected objective or initiative is displayed in the status banner at the top.
- ▶ Hover over the user name in the objective or initiative box and click the icon to bring up the context menu.

To initiate a chat session with the objective or initiative owner, click **Chat**.

To send an e-mail to the objective or initiative owner, click **Email**.

To access the Properties, Scorecard, Graph, Report, Actual Values, or Attachments associated with this objective or initiative box, click the name of the owner or the objective or initiative name within the box and select the appropriate option.

To exit the status map and return to the scorecard, click **Done**.

5.3.2 Graphs and reports

Each objective and initiative has a corresponding graph and report. Graphs provide a visual representation of the actual values recorded and the relationships with target values. The Data Reports display, in table form, all of the actual values recorded along with history of target values, variance, and status.

To view a graph of an objective or initiative:

- ▶ Hover over the objective or initiative name in the scorecard and click the icon to bring up the context menu.
- ▶ Select **Graph** from the context menu.

Note: The graph only shows actual values recorded on or after the objective or initiative creation date. To see actual values recorded before the objective or initiative creation date, refer to the actual values or report tables.

To view a data report of an objective or initiative:

- ▶ Hover over the objective or initiative name in the scorecard and click it to bring up the context menu.
- ▶ Select **Report** from the context menu.

5.4 Approving objectives and initiatives in the scorecard

An objective is a commitment to achieving a specific goal. The objective clearly articulates expectation by allowing users to set thresholds. However, commitments are among two or more people, and Workplace for Business Strategy Execution recognizes the need for an agreement to be reached among the objective issuer and objective recipient.

Scorecards can be approved to ensure alignment and accountability. Scorecards by default are submitted to a person's manager for approval. Who the manager is can be modified by the end user. There is more on this topic in 5.5, "Setting permissions" on page 87.

When you are logged into Workplace for Business Strategy Execution, you will see a "Submit for Approval" button at the top of the screen. When you are ready to submit your scorecard for approval to your approver, click this button.

Important: Your scorecard is ready for approval when both of these are true:

- ▶ You have finished creating objectives. Once submitted, you cannot add new objectives unless your manager reopens your scorecard.
- ▶ You have set up all the properties on your objectives. These will not be editable once you submit the scorecard.
 - You have set up all your targets.
 - You have chosen a data source.
 - You have established linkages. (Optional)
 - You created a Web resource. (Optional)

A message window will appear to explain that some items on your scorecard will not be editable after you submit the scorecard. Click **OK** when you are sure you want to submit the scorecard.

Your manager will receive an alert saying “Scorecard approval required for (your name)”. If your manager clicks on the alert, a menu will appear with Take Action as an option. Clicking this option will take your manager to your scorecard.

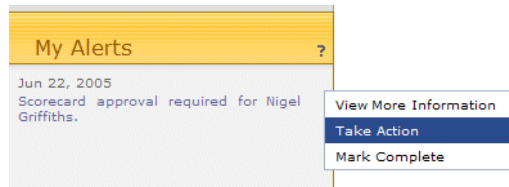


Figure 5-15 An alert appears when a scorecard has been submitted for approval

When your manager is on your scorecard, there will be two new buttons at the top, Approve and Return for revision. Your manager should review the scorecard and choose appropriately. When either button is selected, there will be an option to provide a message to you. If your manager approves the scorecard, you will receive an alert. Go to View More Information to see if your manager left comments. If your manager does not approve the scorecard, you will also get an alert and optional comments. You will have to modify the scorecard and resubmit it for approval. Once approved, your scorecard is locked from further editing. You may add new initiatives to objectives, but all the content on the scorecard remains uneditable.

At any point, your manager can re-open your scorecard and allow you to edit it by clicking **Reopen** at the top of your scorecard. You will receive an alert that says “Your Scorecard has been reopened.” Clicking **Take Action** will bring you to your scorecard if you are not already there.

5.5 Setting permissions

Workplace for Business Strategy Execution provides end users with the ability to manage who can see their scorecard, who can modify it, who can manage certain objectives on it, and who can approve it. These options are set in the Permissions for the scorecard or for individual objectives and initiatives. You can get to the permission settings for your scorecard by selecting the **Permissions** button at the top of the scorecard. You can get to permissions for individual objectives or initiatives by selecting **Permissions** from the objective or initiative’s context menu.

When you select permissions in either case, you will be brought to a window that shows two tabs. The first tab is Access Policy. On this tab, you can see Access, Start Level, End Level, and Inherited. There are roles listed out in the Access column. Each of these roles has a set of associated actions.

Note: For a list of all the roles and actions associated to the roles, refer to the Product Documentation at http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp?topic=/com.ibm.bse.doc/bse/inst_main_ovr.html and select **Users Guide** → **Working with the Scorecard** → **Configuring Access Control Permissions** → **Working with Access Control**.

Start and End Levels refer to your organization hierarchy. You are “0”, your manager is a “1” and your subordinates are “-1”. Your manager’s manager is a “2” and so on. You can modify any of the numbers in these roles by clicking **New Access Policy** and choosing the policy you want to modify or you want to add. If you want to change your policy back to the system setting, simply delete the policies you changed by clicking the trash can.

Note: If you modify any of the default roles, like Viewer, Manager, Owner, and Approver, and you want to return to the default settings, click the delete icon. This will only delete the modifications you made, not the default policy.

The second tab is the User Access Policy tab. In this tab, you can specify individuals who can fall into these different roles. To do so, click **New User Access Policy**. Select a level of access and use the **Find Person** button to search on the individual’s name or group (referring to Portal resource groups) that you want to grant access to or revoke access from.

Administrators set the default policies for the organization. However, end users can refine or expand these policies based on their own preferences. There are several cases where setting permissions different than that of the global setting may be necessary:

- ▶ There may be some objectives or initiatives that contain sensitive information or need to be restricted from company-wide view for regulatory reasons.
- ▶ Certain individuals may manage a scorecard or individual objectives for another person.
- ▶ You may need to grant access to groups temporarily while working on a project.

For more information and screen captures on setting access, see 8.3, “Access policies and user access policies” on page 159.

5.6 Making modifications to objectives and initiatives

Over time, your company’s strategy may change. So may your objectives, initiatives, targets, or linkages. With Workplace for Business Strategy Execution, the majority of data is editable, though you will find cases where it is not. This section will help you understand those cases.

- ▶ If you submit your scorecard for approval, you cannot edit any of your objectives or add new objectives. You can add new initiatives to objectives.
- ▶ If you create a new objective, you cannot modify its value type.
- ▶ If you create a new objective and establish alignment type linkages (solid line contributors) for the objective, you cannot change the data source. In order to change the data source, you will have to delete your alignment type linkages.

- ▶ If you create a new objective and track actual values on it or have values that have rolled up to it, you will not be able to modify milestones that have occurred in the past. When you get to the Target Scheduler, you will find the past milestone locked.
- ▶ If you create a new objective and track actual values on it or have values that have rolled up to it, you will also be unable to add new zones or remove them from the Target Scheduler.

5.7 Different types of objectives and initiatives

In this section, you will learn about some of the techniques used to handle different types of objectives and initiatives, along with examples of how their targets would be set up using our scenario organizations to illustrate.

5.7.1 The budget scenarios

This is probably the simplest of all of the scenarios that will be discussed in this section. In this type of objective, several other objectives will be added up to reflect an overall status. This is common in expense scenarios, where parts of a budget are shared among a set of people. It is also much like the Achieve Revenue Goals objective Ronnie set up earlier.

Tools used in this scenario:

- ▶ Alignment type linkages
- ▶ Data Aggregation
- ▶ Target Scheduler

In this scenario, Judith Batista, the Executive Director of ITSO Science Museum, created a budget objective and shares it with her team (see Figure 5-16). First, she determines what the overall target is and who is going to share in accomplishing the goal. When she creates the new objective, she will need to enter in a name, a milestone schedule, and a final target. At the ITSO Science Museum, expenses are measured quarterly.

New Objective for Judith Batista

Create an Objective
The **Objective name** you specify appears in your scorecard and is associated with a **Perspec**

* Objective name:
Maintain Spending Targets

Description:

Perspective:
Finance

Value type:
Currency

Milestone:
Quarterly

* Beginning value:
1375000

* Target value:
4000000

* Required field

OK Cancel

Figure 5-16 Judith creates a new Maintain Spending Targets objective

After creating the objective, Judith modifies its properties by clicking the objective and going to **Properties** in the context menu. Here is where she will lay out the milestone targets for the objective. Notice that here in Figure 5-17 on page 91, the green zone is on the bottom and the red is at the top. As this is a budget example, this means the goal will be to stay below at least as much as shown in the line along the green/yellow zone.

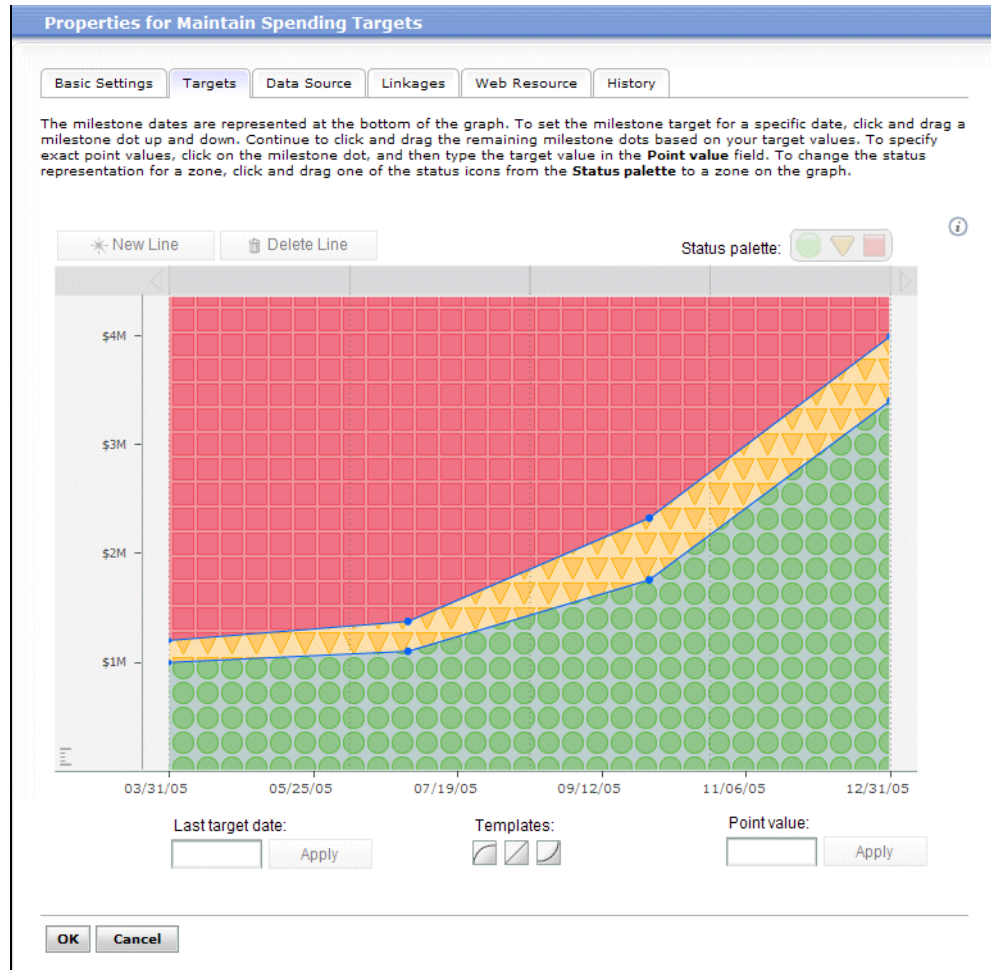


Figure 5-17 Judith sets the targets in the Target Scheduler

If Judith had entered a target value greater than her starting value, the zones in the Target Scheduler would have been laid out with green on the top and red on the bottom. Manually changing this is easy. We can modify the Target Scheduler by dragging color from the “Status Palette” onto the graph view. This is shown in Figure 5-18.

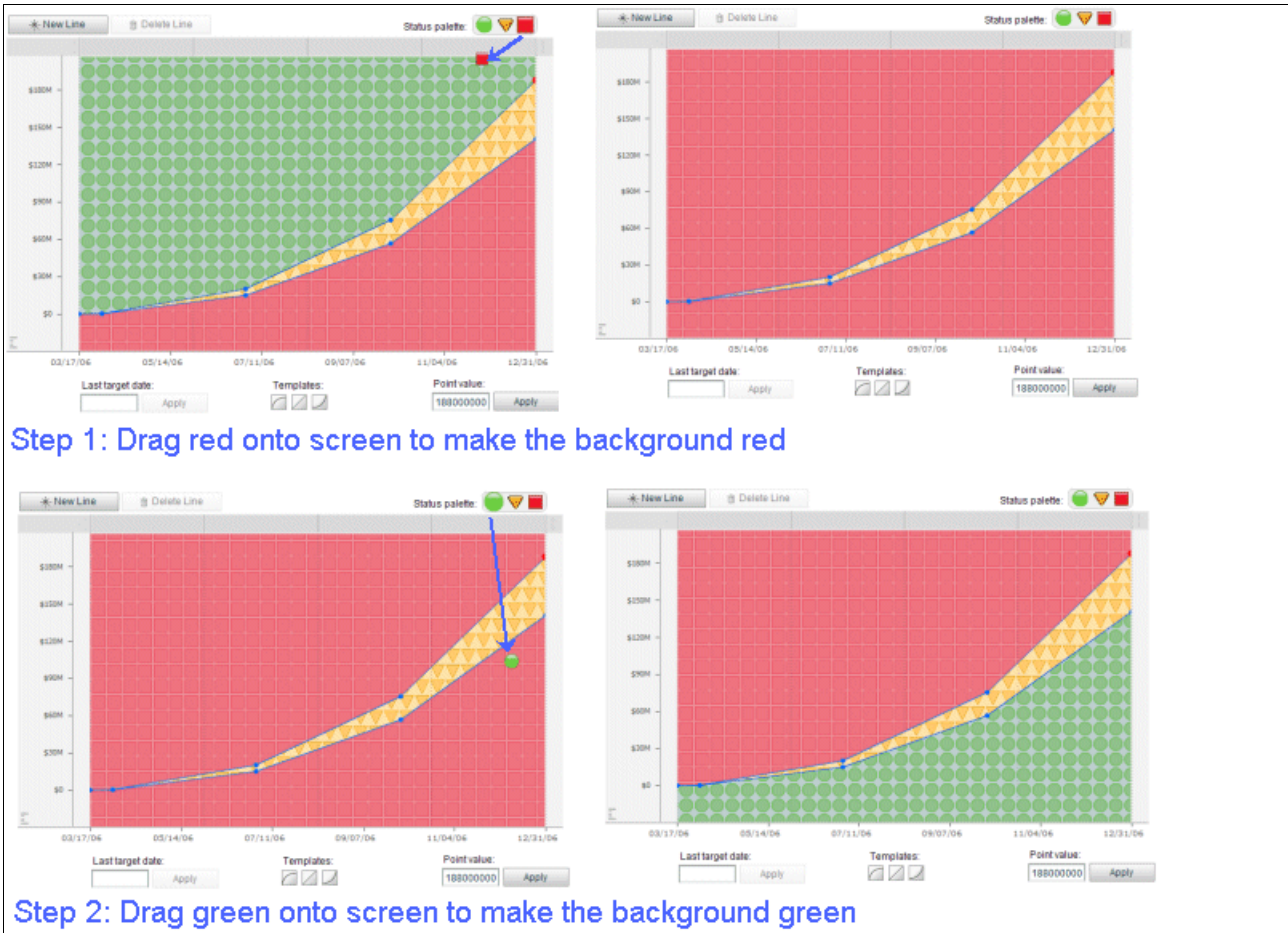


Figure 5-18 Using the Status Palette, you can change the color behind the graph

Once the targets are set, the data source and linkages need to be defined. For a data source, Judith chooses **Aggregate from alignment** and **Additive** as the method for alignment. This will ensure that the linked actual values will be added up to represent her view.

On the Linkages tab, she specifies all the people who will own a part of the objective (see Figure 5-19 on page 93). These people may own a region or a territory, and she may wish to give each one a different target. She certainly can assign different targets to different owners, and the value will roll up accordingly.

Properties for Maintain Spending Targets

Basic Settings | Targets | Data Source | **Linkages** | Web Resource | History

You can push your objective to others or link your objective to another person's existing objective. To push your objective to another person, click **Push Objective**. To link your objective to another objective, click **Link to Existing Objective**. If you push an objective to others, a new objective is created for them with your suggested targets. The new objective is aligned with this objective. If you link to an existing objective, your objective assumes the characteristics of the linked objective, and you need to specify the objective as a linkage type of alignment or dependency.

Aligned to: Rebecca Rich, Maintain Spending Targets

| Objective | Owner | Linkage Type | Target |
|---------------------------|----------------|--------------|---------|
| Maintain Spending Targets | Lars Roherberg | Alignment | \$2 M |
| Maintain Spending Targets | Carrie Ford | Alignment | \$1 M |
| Maintain Spending Targets | Clare Boothe | Alignment | \$1.8 M |

Page 1 of 1 Total: 3 Displayed: 3

Aggregation type: Additive
Available for allocation: \$0

Figure 5-19 Judith's budget objective with several linkages, showing a variety of different targets

5.7.2 The middle-of-the-road scenario

In some cases, you may need to be very specific regarding a target's boundaries. In the case of ITSO Science Museum, there is an objective to increase the number of employees. With headcount, the goal is not to hire too many people beyond the budget, nor is it to reduce the size of the organization below operational capacity. To handle this type of objective, Judith, the Executive Director, creates a set of targets that reflects this narrow range of anticipated results.

Tools used in this scenario:

- ▶ Target Scheduler
- ▶ Additional target lines
- ▶ Status Palette

In order to create this layout, Judith would first add two new lines to the Target Scheduler by clicking **New Line** in the upper left hand corner (see Figure 5-20).



Figure 5-20 Modifying the Target Scheduler to meet a narrow range of expected performance

Tip: When adding the new lines, you can specify above which line you would like the new lines to be placed:

- ▶ Hover on the line that falls on the green and yellow zone until the line is bold blue.
- ▶ Click the line so that it turns red.
- ▶ Click **New Line**.

This will add the new line above the selected line.

Next, Judith drags the red square icon from the Status palette and drop it onto the top portion of the graph. This changes the color to red in that region. Next, she does the same with the yellow triangle. This specifies the green middle zone as the target area for the objective or initiative.

5.7.3 The sub objective scenario

Lars Roherberg, the Exhibits and Marketing Coordinator for ITSO Science Museum, has an objective to Initiate Marketing and Exhibition® Programs. He has pushed part of this objective to Idell Ghazall, who is in charge of marketing for the museum. Idell needs to further divide the objective into several smaller objectives that she owns. She has three marketing objectives that roll up into her marketing objective: Museum and External Events, Sponsorships, and Promotions and Advertising, each with their own target. It is possible to do this by establishing a linkage to herself.

Tools used in this scenario:

- Alignment type linkage
- Push objective to self

Idell can push an objective to herself just as she can push an objective to someone else. Similarly, she could link to an existing objective on her own scorecard. In the example below, Idell owns “Marketing Programs”, which she has divided into three sub objectives: Museum and External Events, Sponsorships, and Promotions and Advertising. She accomplished this by pushing the objectives to herself three times, each time specifying a new name for the objective that matches her intended structure. The results of these three objectives will roll up to represent the overall status for her Marketing Programs objective, eventually rolling up to Lars.

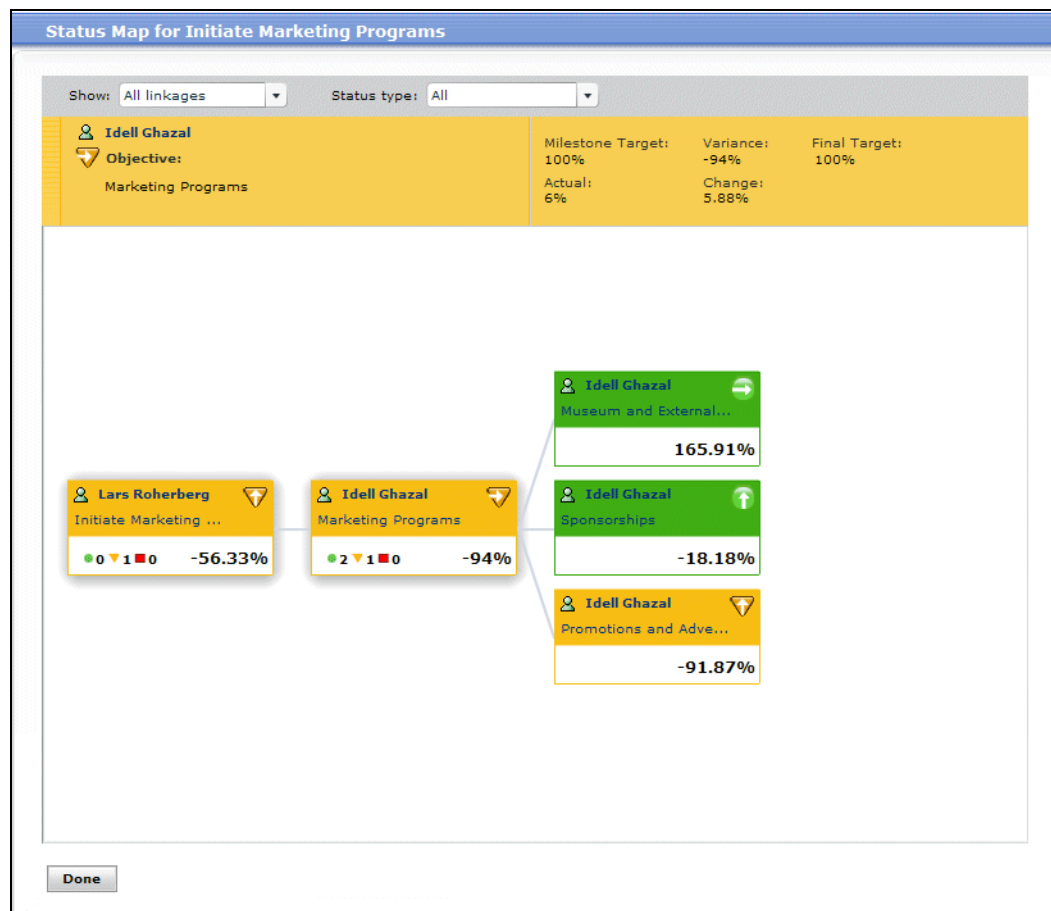


Figure 5-21 Idell can push an objective to herself to create sub objectives

5.7.4 Span of alignment scenario

There are certain scenarios where rolling up values for an objective may not be appropriate. For example, ITSO Insurance has an objective to restructure management compensation. Dennis, the CEO, has this objective on his scorecard and has pushed it out to Rebecca Rich, one of his EVPs. Rebecca has some activities going on in her team regarding the restructuring that do not affect Dennis' numbers, but she does need to keep track of his objective as well. She can retain these associations without rolling up values.

In Figure 5-22, we see that Rebecca has been linked to Dennis' restructuring objective. Rebecca's objective is linked to another one of her own objectives, Internal Restructuring Programs. This objective is dependency linkages and not alignment linkages, as shown by a dotted line instead of a solid line.

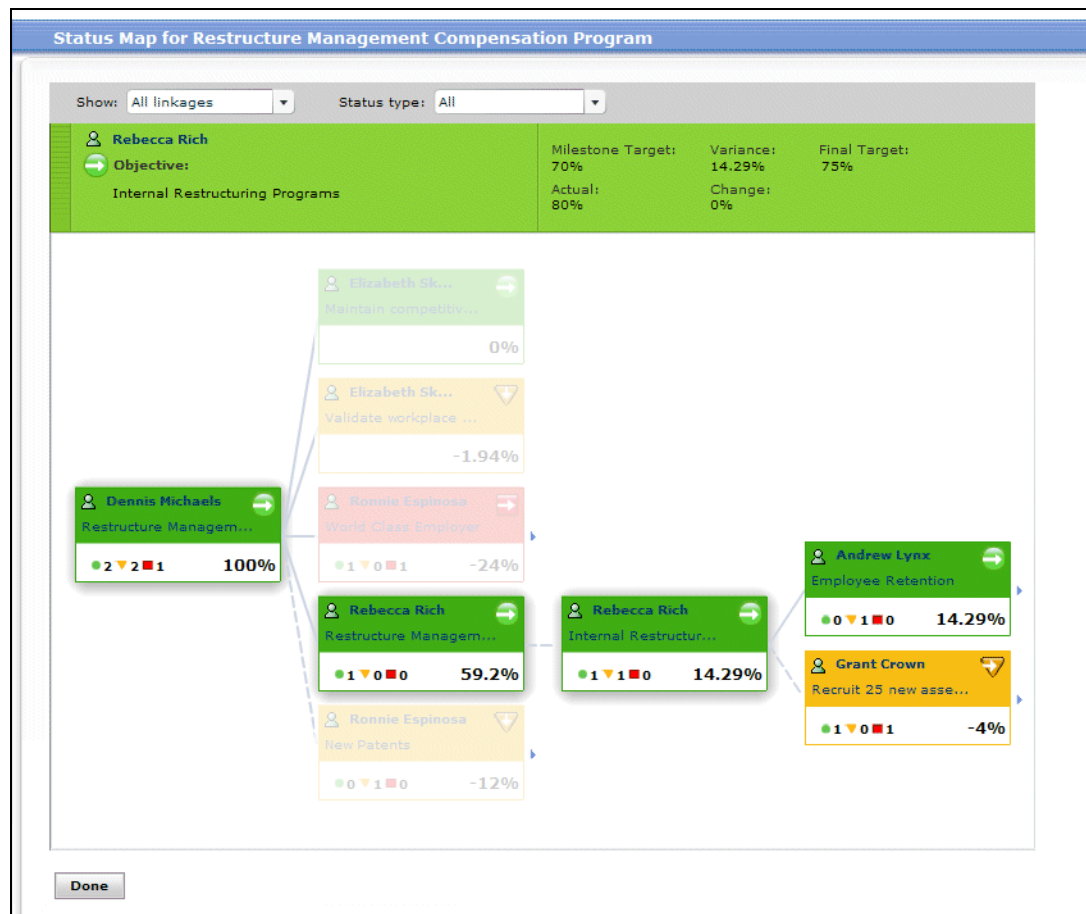


Figure 5-22 Create dependency linkages to prevent data from rolling up

This allows Rebecca to keep the objective values owned by Andrew and Grant from rolling all the way up to Dennis. Dennis can still drill down and see the structure, but the actual number rolling up is from Rebecca's restructuring objective. This is useful to Rebecca because the number used to track the restructuring is not the same as her internal restructuring programs, but they are certainly still linked.

5.7.5 Subjective assessment scenarios

In many cases, data is not available to report on the status of an objective. You may have personal objectives for which there is no data source to draw your actual values, or you may need to give a subjective judgement on the performance of an objective. In these cases, you have a few options for creating objectives with subjective assessments.

The first option is to use the data type of boolean to give a “yes” or “no” to how the objective is performing. To do this, you would choose **Boolean** as the data type when you are creating the new objective. For example Mentor New Hires is an objective that may not have a data source or data to support it. You can set this type of objective to Boolean and track the Yes or No manually. To track this data yourself, click the objective and select **Actual Values**. From here, you can select **Yes** or **No** and add that to the actual values. A status icon will appear on the scorecard that reflects your selection compared to your target. If your target is Yes and you entered No, you will see a red icon. If your target is No and you entered No, then you will see a green icon. In this case, you would not have yellow zones.

Another type of subjective assessment is to give an objective a red, yellow, or green status (see Figure 5-23). Like the boolean yes/no example, you may need to give an assessment on the performance of an objective. Rather than be limited to yes and no, or green and red, you may want to use the yellow zone.

Dennis, the CEO of ITSO Insurance, has an objective to *Design and launch an insurance program for home building contractors*. This objective is measured subjectively by managers in the company. To allow this to be treated as a status based objective, Dennis does the following.

To achieve the same concept as the Boolean example, Dennis treats the objective like a number-type even though it is in reality not reporting a number. When he creates the objective, he chooses “number” type, though note that this scenario can be achieved using other options. Then he chooses yearly as the milestone target to make setting up the targets easy.

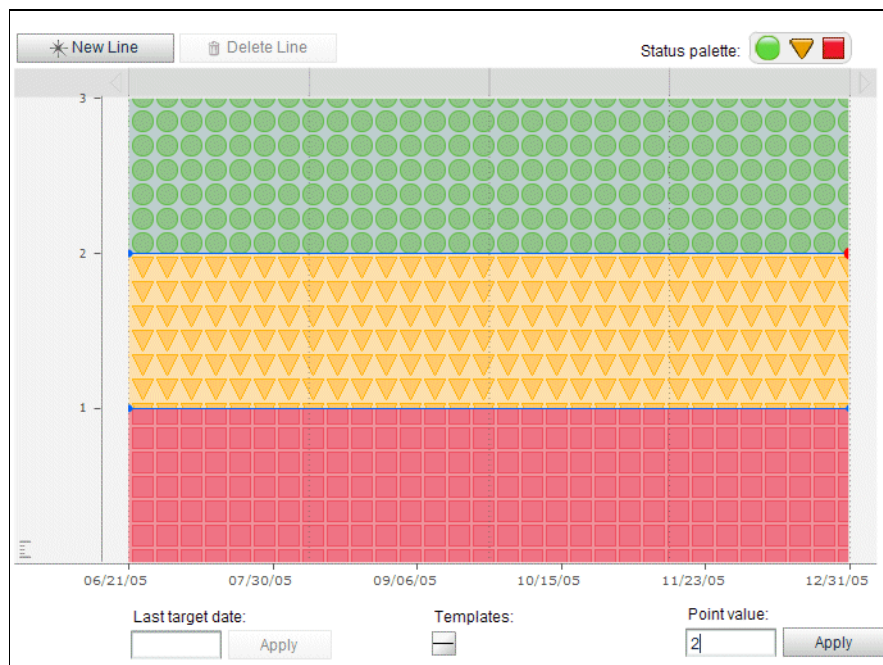


Figure 5-23 Giving an objective a red, yellow, or green assessment

Next, Dennis chooses **1** as the starting value and **1** as the final value. This will create a line straight across on the target scheduler. He adds another line at “2”. Then he saves the objective this way by clicking **OK**.

Now he can begin to log actual values. To represent a green status, he enters in an actual value of 2. To represent a yellow status, he enters in an actual value of 1. To represent a red status, he enters in an actual value of zero. This feature will be enhanced in the next version of Workplace for Business Strategy Execution (please see Appendix A, “Looking forward” on page 195).

5.7.6 When your objective’s target is always the same

Sometimes you will have objectives where the targets do not change. For example, Dennis of ITSO Insurance has an objective to *Earn a return on equity of at least 12%*. In this case, when Dennis creates the objective, he gives the objective the same Beginning Value and Target Value (see Figure 5-24). This will make the Target Scheduler set your targets on a horizontal line rather than a slope.

New Objective for Dennis Michaels

Create an Objective
The **Objective name** you specify appears in your scorecard and is associated with a **Pers**

* **Objective name:**
Earn a return on equity of at least 12%

Description:

Perspective:
Finance

Value type:
Percentage

Milestone:
Monthly

* **Beginning value:**
12

* **Target value:**
12

* **Required field**

OK **Cancel**

Figure 5-24 Give an objective the same Beginning and Target Values for horizontal target lines

5.7.7 Updating Data from MS Project into Workplace for Business Strategy Execution

Dennis of ITSO Insurance has an objective to *Introduce a Service Web site for Commercial Policyholders*. This objective is rolled out to a project manager who bases the objective’s status off of project plans kept in Microsoft Project. Workplace for Business Strategy Execution can take the % Complete field from MS Project and display it in the scorecard in a few steps (see Figure 5-25 on page 99).

Note the percentage complete for each objective

| | Task Name | Duration | Start | Finish | % Complete | Predecessors |
|----|-----------------------------------|----------|--------------|--------------|------------|--------------|
| 1 | ✓ IDEF0 Existing Design | 11 days | Thu 10/1/98 | Thu 10/15/98 | 100% | |
| 2 | IDEF0 New Design | 21 days | Thu 10/1/98 | Thu 10/29/98 | 20% | |
| 3 | Value Analysis | 6 days | Thu 9/17/98 | Thu 9/24/98 | 85% | |
| 4 | ✓ QFD Analysis | 13 days | Tue 9/22/98 | Thu 10/8/98 | 100% | |
| 5 | DFA Existing Design | 11 days | Thu 10/8/98 | Thu 10/22/98 | 24% | |
| 6 | DFA New Design | 19 days | Thu 10/8/98 | Tue 11/3/98 | 34% | |
| 7 | Bill of Materials Existing Design | 11 days | Thu 10/1/98 | Thu 10/15/98 | 55% | |
| 8 | Bill of Materials New Design | 21 days | Thu 10/1/98 | Thu 10/29/98 | 60% | |
| 9 | Operational Requirements | 11 days | Thu 10/1/98 | Thu 10/15/98 | 65% | |
| 10 | Final Presentation | 9 days | Thu 10/29/98 | Tue 11/10/98 | 23% | |

Figure 5-25 The percentage complete column will update objectives

The first step is to create a custom field in MS Project. The project manager goes to **Tools - Customize - Fields**, as shown in Figure 5-26.

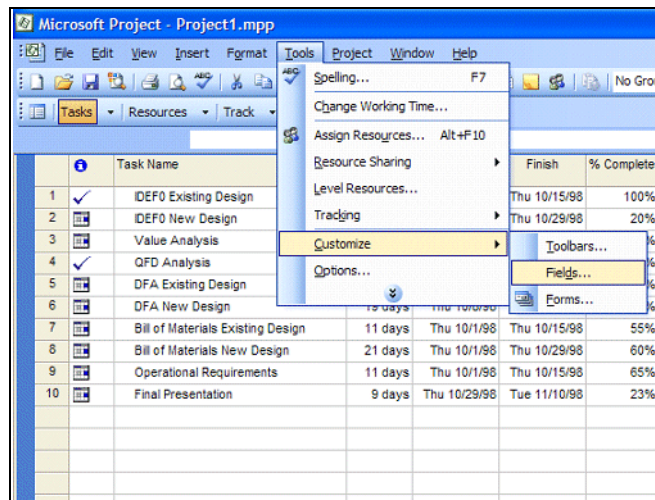


Figure 5-26 Create a Custom Field

On the Custom Fields tab, he chooses **Task** as the field and **Number** as the type. He selects a number to use. In Figure 5-27, “Number 1” was chosen and renamed to “WBSE Output”. Also, set “Custom attributes” to **Formula**.

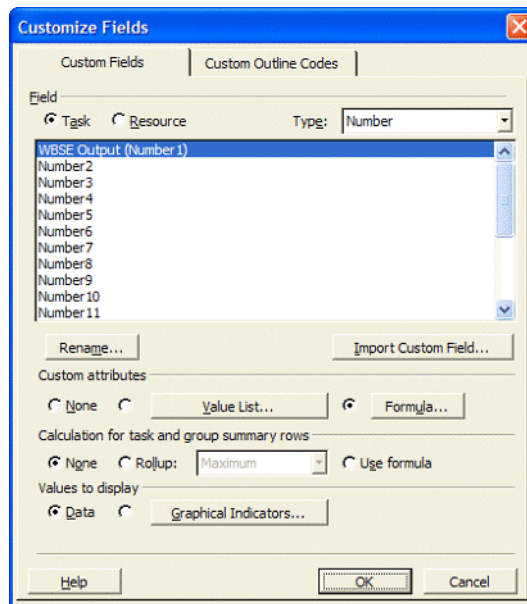


Figure 5-27 Choose a Number Resource

The next step is to set the WBSE Output to the Percentage Complete field. This will convert the percentage to a number that can be fed into Workplace for Business Strategy Execution. The project manager adds this field to his project plan; it will be the same numbers as the Percentage Complete column without the % symbol (see Figure 5-28).

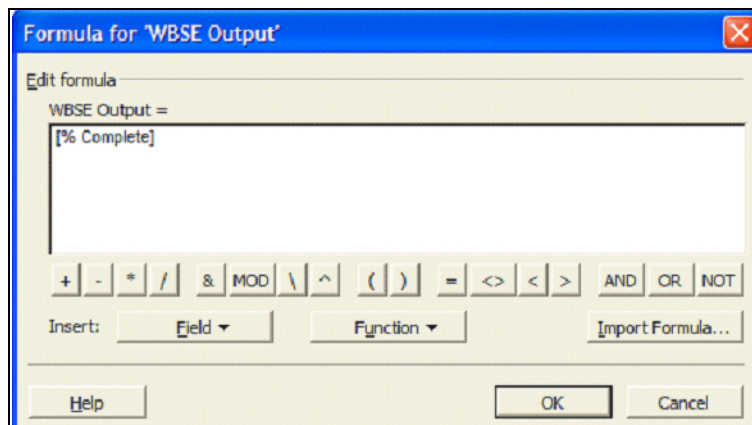


Figure 5-28 Set number variable to the Percentage Complete field

Now, the project manager saves the project plan as an Excel Workbook (see Figure 5-29 on page 101). This will start the export wizard.

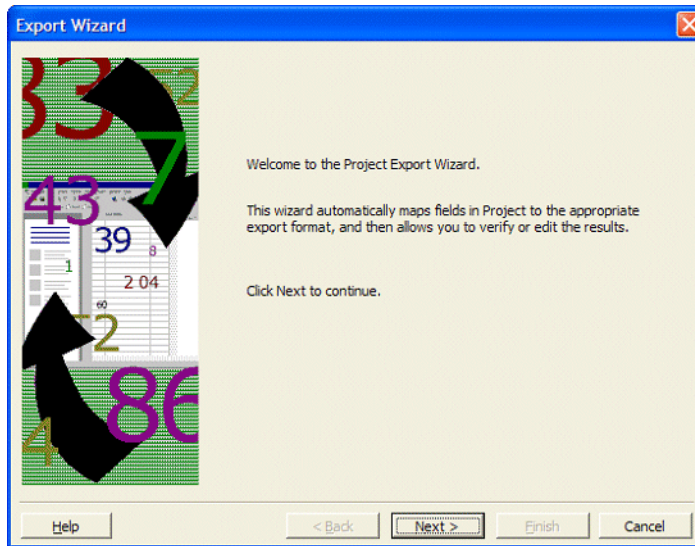


Figure 5-29 Saving project as an Excel workbook

He clicks **Next**, and is then asked to choose the format of the data he wants to export. He chooses **Selected Data** and clicks **Next**.

He will then be asked to choose a new map or an existing map. He chooses **New Map** and clicks **Next**.

Next, he selects **Tasks** as the type of data to export and is sure to *remove* the checkmark on **Export Headers**. He then clicks **Next**.

On the next window, he will add two mappings. The first is WBSE Output and the second is Name. This will create a spreadsheet in the right format for import into Workplace for Business Strategy Execution, as shown in Figure 5-30.

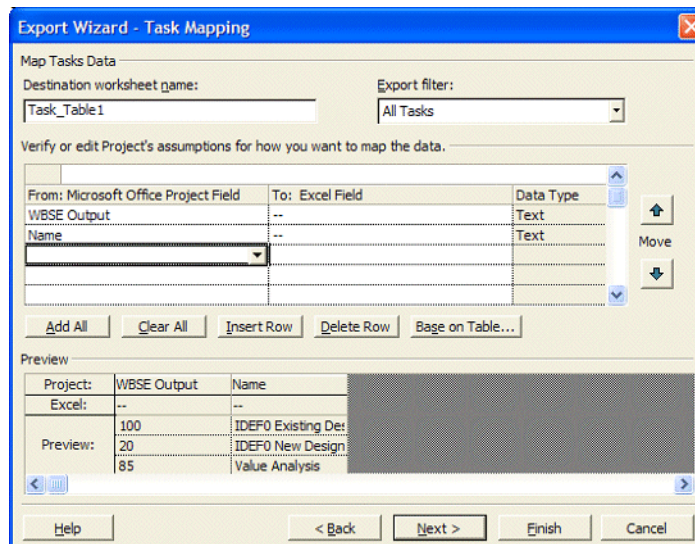


Figure 5-30 Create two mappings for import into Workplace for Business Strategy Execution

He clicks **Finish**. The output will be saved to an Excel spreadsheet that can be easily imported into Workplace for Business Strategy Execution, as shown in Figure 5-31. Depending on the version of Project he is using, he may need to open the XLS file and resave it.

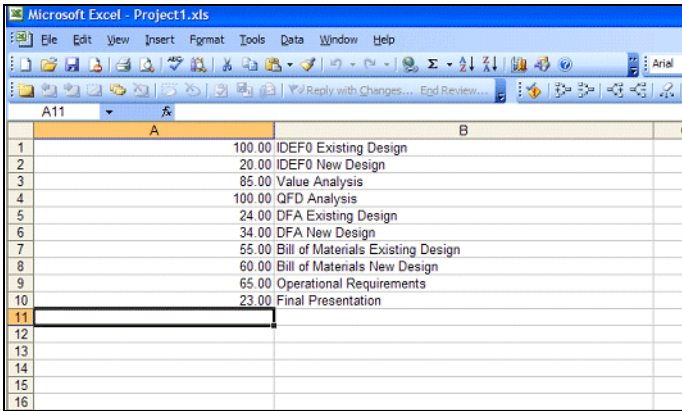


Figure 5-31 The Excel output of the Project Plan

Now that he has the spreadsheet, he can import the file into Workplace for Business Strategy Execution by clicking **Import** on your scorecard. The numbers in Column A will match up to the objectives in the scorecard and in Column B.

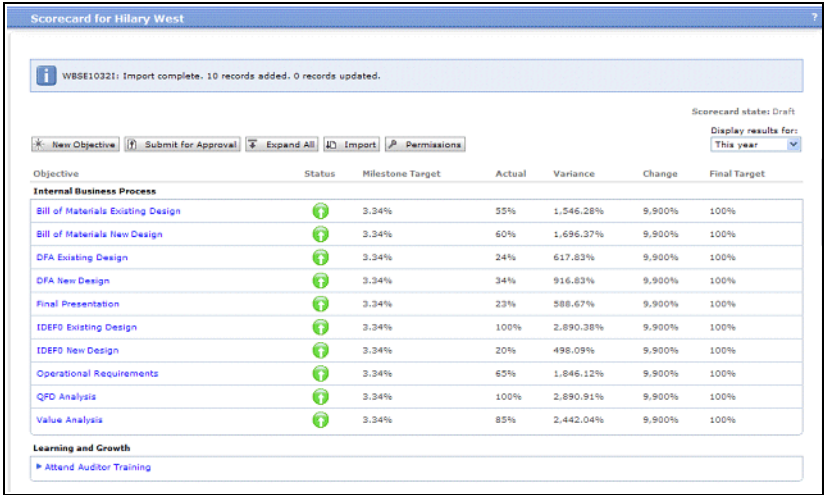


Figure 5-32 Imported values from MS Project

5.7.8 Spreadsheet dashboards

At the ITSO Science Museum, many reports are held in spreadsheets that are shared throughout the organization. This organization wanted to create a Web resource that links their *Number of new memberships* objective to a dashboard page containing the spreadsheet listing all of the new members and their demographics. There is a portlet in the IBM Workplace Solutions Catalog (<http://catalog.lotus.com/wps/portal/workplace>) called the Office Document Viewer portlet. This is a portlet that can be added to a dashboard page and display a spreadsheet in context to your sales or expense objective. The portlet uses a URL to the spreadsheet and displays it in the dashboard.

For more information about linking objective to a dashboard, see 4.5, “Linking objectives and initiatives to resources” on page 60.



Dashboard

This chapter will explain what dashboards are and how they are used in Workplace for Business Strategy Execution. We will discuss what resources you can use to quickly get started making dashboards using existing resources. We will also provide an overview describing how to build dashboards utilizing IBM Workplace Dashboard Framework, a powerful and flexible tool for quickly creating dashboard portlets from a wide variety of data sources. Finally, we will examine how our scenario organizations, ITSO Insurance and the ITSO Science Museum, implemented their dashboards.

Topics in this chapter:

- ▶ An overview of dashboards
- ▶ Using existing resources to build a dashboard
- ▶ Using the IBM Workplace Dashboard Framework to build customized portlets and dashboards

6.1 Dashboard overview

In concert with the scorecard, dashboards turn strategic alignment and accountability into action. Dashboards enable decision makers to rapidly gain insight, effectively evaluate a situation, and quickly respond. By integrating data from a variety of sources, dashboards provide a unified display of relevant and in-context information for informed decision making. To encourage and facilitate action, dashboards are directly linked to objectives and initiatives in the scorecard.

In Workplace for Business Strategy Execution, dashboards are portal pages that contain data relevant and in context to a specific objective. For example, Dennis Michaels, the CEO of ITSO Insurance, has an objective to Maintain Revenue Goals. Dennis would likely have a great deal of data related to revenue - maybe sales and client data - that he would want to view in context to that objective. Dennis can link his objective to a specific dashboard page so his data is available from that objective.

A metaphor that can help explain how scorecards and dashboards relate is one of a student's report card. Imagine the scorecard as a report card a student might receive from school. After examining their report card they would like to see how their teacher arrived at the grade for a class. The dashboard is equivalent to the detailed file that the teacher keeps for the student. It contains all their graded tests and homework assignments. The student can see which areas of the class they need tutoring or extra effort, helping pinpoint the root cause of the issue.

Dashboards help users visualize information across many data sources and can be made up of a combination of graphs, charts, RSS feeds, business portlets and more. Essentially, the dashboard is a composite application made up of portal pages containing portlets. These portlets can be the portlets that come with Workplace for Business Strategy Execution, can be installed from other sources like the IBM Workplace Solutions Catalog, or can be built from scratch. Since much of the data that users will want to see in their dashboards require custom creation, we will also include information about IBM Workplace Dashboard Framework, a rapid dashboard development tool you can use to build your own custom portlets.

Attention: In this chapter, we will refer to Portal quite frequently. Each edition of Workplace for Business Strategy Execution is based on WebSphere Portal. The Team Edition is based on Workplace Services Express, which includes Portal 5.0.2.2. The Enterprise Edition is based on Portal 5.1.

Checklist for creating a dashboard

No matter what methods are used for developing dashboards, whether it is to create your own portlets or use existing ones, there are some steps the Administrator and End Users need to go through to get dashboards running in the Workplace for Business Strategy Execution environment.

Administrator Checklist:

1. Download and install the portlets needed on the dashboard pages to the portal.
2. Grant users permission to access to the portlets and configure them as needed.
3. Set up portal pages, with or without portlets on them, that users can create linkages to from their scorecard objectives. Note that this step can be bypassed if users want to create their own pages; however, all linkages from objectives to dashboards will be based on URLs and open in new windows. See 8.9, "Dashboard administration" on page 186 for more information.

User Checklist:

- ▶ Add portlets to your dashboard pages as needed.
- ▶ Edit or configure portlets, as required.

6.2 Creating a dashboard with existing portlets

In this section, we will cover building a simple dashboard for ITSO Science Museum. As mentioned earlier, in its most basic structure, a dashboard is essentially a Portal page with a collection of useful portlets. With the current release of Workplace for Business Strategy Execution, Administrators have the ability to create new Portal pages that will be used as dashboard pages.

6.2.1 Portlets

From a user's perspective, a portlet is a window in the portal that provides a specific service or some type of information, such as a view into a discussion forum or a news feed. From an application development perspective, portlets are pluggable modules that are designed to run inside a portlet container of a portal server.

In order to build dashboard pages, you first need portlets to put on those pages. There are some portlets that come with your edition of Workplace for Business Strategy Execution, but there are also several hundred more available online. One resource for downloading portlets is the IBM Workplace Solutions Catalog. There may be a number of useful portlets for your dashboard in this catalog or portlets built by some IBM partners. For example, a simple Notes viewer portlet could provide a very useful view into an important data source being used to generate reports on the Workplace for Business Strategy Execution scorecard.

Tip: For the most up-to-date information about portlets, including the latest portlets that are available for download, visit the IBM Workplace Solutions Catalog at:

<http://catalog.lotus.com/wps/portal/workplace>

6.2.2 Technical portlet features

The underlying Portal server provides a framework of services to make the task of writing and managing portlets easier. Portlets rely on the Portal infrastructure to access user profile information, to communicate with other portlets, access remote content, lookup credentials, and store persistent data. The inner contents of the portlet are then generated with any number of Web technologies. A developer could use anything from the Domino Java™ API to AJAX to grab data, perform the necessary manipulations and then display that data in whatever chart, graph, list, or HTML format desired.

WebSphere Portal has some key features to keep in mind when developing dashboard portlets:

- ▶ **Collaboration:** Views into e-mail or in many cases a Portal server will have instant messaging integration that will allow the use of Livelinks. Livelinks refers to the online status of Portal members wherever their name appears. For example, when viewing a list of documents with the author's names beside each document, those author names will show up as they would in an instant messaging buddy list, either online and ready to chat, offline, away, or set to do not disturb.
- ▶ **Portlet to Portlet Communication:** Create contextual applications where the appropriate data is displayed based upon the user's actions.

- ▶ **Single Sign On:** Enhance the usability of the dashboard by enabling single sign on so a user is not prompted for multiple logins.
- ▶ **Portal Roles and Groups:** Deliver customized and personalized content, data, and processes.
- ▶ **Integrated Workflow:** Help increase employee productivity by kicking off things like a workflow and processes.
- ▶ **Service Oriented Architecture:** Eases integration of relevant data and content from a wide variety of systems.

6.2.3 ITSO Science Museum deploys some simple dashboard portlets

The ITSO Science Museum decides they need a view into some of the data sources they are using to support their objectives. They do not need a deeply sophisticated set of dashboard portlets to achieve their goal. A large set of their data comes from Microsoft Excel spreadsheets and PowerPoint® presentations. The ITSO Science Museum will deploy some straightforward viewers so that they can move from the scorecard to see the full spreadsheet or presentation of data being used on the back end. Each user in the organization has their own Portal page where they can deploy the portlets and content that is pertinent to them. The resulting dashboard for Lars Roherberg, who is in charge of Exhibits and Marketing, looks Figure 6-1.

The screenshot shows the IBM Workplace Services Express interface. The top navigation bar includes 'Welcome', 'Mail', 'Business Strategy Execution', 'Budget Dashboard' (selected), 'Customer Dashboard', 'Team Spaces', and 'Search'. The user is logged in as 'I am available'. The main content area displays an 'Excel Document Viewer' portlet showing two Excel spreadsheets.

Excel Document Viewer - Budget Report Sample - Quarterly View

| | Q2 Actual | % Attain | Q2 Plan | Target | Q2 Plan | Budget |
|--------------|-------------|------------|---------------|--------------|---------------|-------------|
| Finance | 27.3 | 41% | 66.59 | -3.2 | 66.59 | -5.6 |
| Programming | 22.4 | 61% | 36.72 | 4.5 | 36.72 | 4.1 |
| Education | 1.1 | 75% | 1.47 | -1.5 | 1.47 | -1.3 |
| Exhibits | 1.3 | 45% | 2.89 | -0.95 | 2.89 | -7 |
| Total | 52.1 | 59% | 107.66 | -1.15 | 107.66 | -9.8 |

Excel Document Viewer - Full Year Review

| | 1Q | 2Q | 2006 Assess 3Q | 4Q | FY | FY Target | FY Budget |
|--------------|---------------|---------------|----------------|--------------|---------------|--------------|--------------|
| Finance | 65.3 | 66.59 | 48.2 | 71.3 | 251.39 | 250 | 275 |
| Programming | 44.1 | 36.72 | 28.4 | 41.9 | 151.12 | 135 | 145 |
| Education | 0.75 | 1.47 | 0.7 | 0.9 | 3.82 | 2.5 | 3.5 |
| Exhibits | 1.3 | 2.89 | 2.2 | 1.6 | 7.99 | 5 | 5 |
| Total | 111.45 | 107.66 | 79.5 | 115.7 | 414.31 | 392.5 | 428.5 |

Figure 6-1 A simple dashboard page displays Excel data using the Excel Document Viewer portlet

In order to create this dashboard, the following steps occurred:

1. The Workplace for Business Strategy Execution Administrator downloaded the Office Document Viewers portlets from the IBM Workplace Solutions Catalog. She then installed the portlets on the Portal and granted access to the users wishing to use these portlets.
2. The Workplace for Business Strategy Execution Administrator placed the files that were going to be rendered in the portlets (the spreadsheets and PowerPoint files) onto a Web server so that each file could be URL addressable. She gave access to the Web server to her users so that they could upload new files as needed. She also gave the users a URL to access their files from.
3. The Workplace for Business Strategy Execution Administrator created a new page in the Portal to serve as the main dashboard page for all users. Each user could customize the dashboard page with his or her own set of portlets
4. The Workplace for Business Strategy Execution Administrator gave this page a Custom Unique Name so that the users could link their objectives to the page. See 8.9, “Dashboard administration” on page 186 for assistance on setting up Custom Unique Names.
5. The Workplace for Business Strategy Execution user places the Office Viewer of choice on the new page. They click the edit (pencil) icon in the portlet and give the URL of the file location (for example, <http://www.itsomuseum.com/files/spreadsheet.xls>). So long as the client machine used to view the dashboard has the Office product on it, the portlet will render the file right on the page.

Tip: Depending on your browser or browser settings, you may be asked to download a file rendered in the Office portlet. If using Internet Explorer, you can choose to open the file right in the portlet instead of saving it to your disk.

6.3 Building custom portlets

While it is possible to develop your own set of custom portlets for use on dashboard pages, another IBM product, IBM Workplace Dashboard Framework, is especially useful for rapidly building role-based dashboards on top of a service-oriented architecture (SOA). Workplace Dashboard Framework augments the capabilities of IBM WebSphere Portlet Factory, adding dashboard-specific features, such as a robust alerting module, hi-fidelity charting, flexible filtering technology, and a set of dashboard-specific design components. By leveraging Workplace Dashboard Framework, you can help reduce development costs and quickly deploy highly-tailored, portal-based dashboards that consolidate data and processes from multiple back-end systems.

As described above, Workplace Dashboard Framework plugs into IBM WebSphere Portlet Factory, which is an SOA-based, portlet creation environment that simplifies and accelerates the construction, deployment, maintenance, and reuse of custom portlets. WebSphere Portlet Factory includes wizard-based software automation components, called Builders, that automate common development tasks, like integrating with back-end systems like SAP, PeopleSoft, Domino, and Siebel.

Tip: WebSphere Portlet Factory Integrates with:

- ▶ Lotus Domino: Easily create robust composite applications and portlets that leverage existing Domino data and applications.
- ▶ SAP: Quickly extend existing SAP business processes and data to portal-based composite applications.
- ▶ PeopleSoft: Quickly and easily create, customize, deploy, and maintain robust portlets and composite applications that leverage existing PeopleSoft business processes and data.
- ▶ Siebel: Quickly extend existing Siebel business processes and data to portal-based composite applications.
- ▶ Databases: Rapidly build database-driven Web applications and portlets that enable end users to search, view, edit, and delete database data.
- ▶ Web Services: Easily create Web services and Web service-driven composite applications and portlets.

Attention: For more detailed information refer to the IBM Workplace Dashboard Framework product documentation at:

<http://www-128.ibm.com/developerworks/workplace/documentation/dashboard/>

Figure 6-2 provides a diagram of the various layers of the IBM Workplace Dashboard Framework.

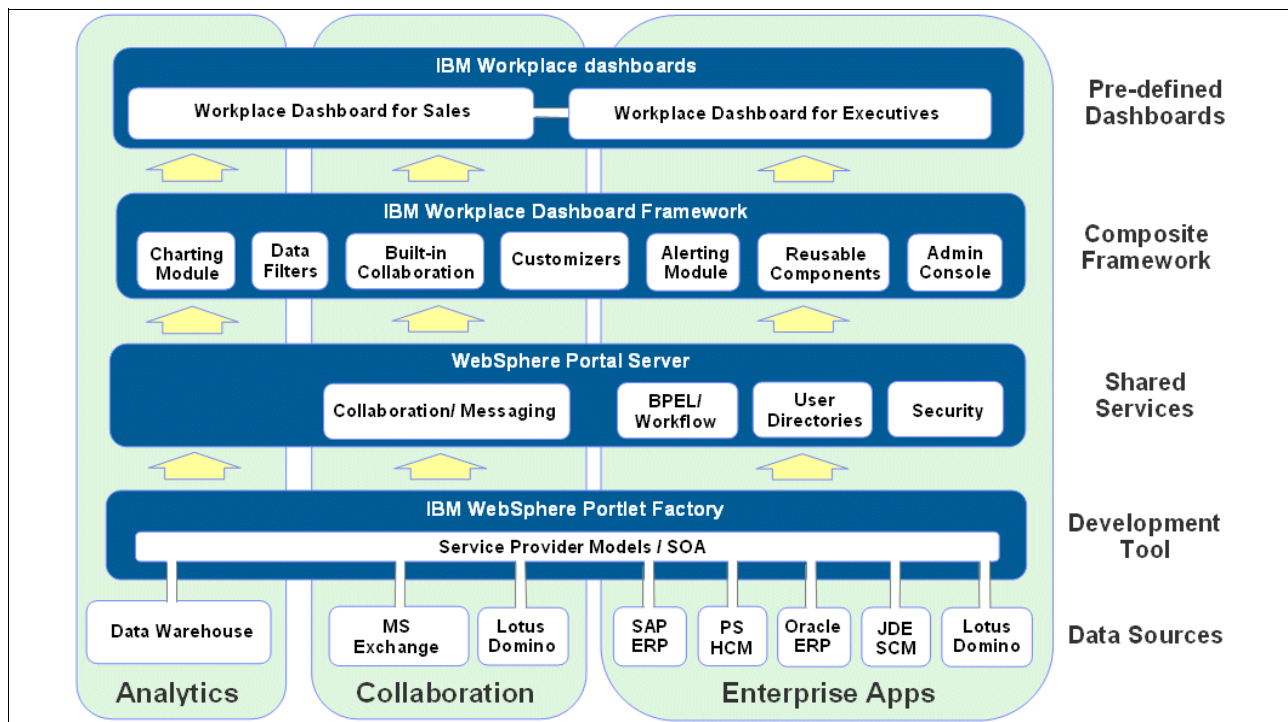


Figure 6-2 Workplace Dashboard Framework architecture

The first layer of the architecture stack pictured above is the data sources. Data can be sourced from a number of different systems, including enterprise applications like SAP, collaborative platforms like Domino, and historical or analytical data from products like DB2®

Alphablox. For more information about DB2 Alphablox, refer to the product documentation at <http://www-306.ibm.com/software/data/db2/alphablox/>.

The next level illustrated in the diagram is the core development tool, WebSphere Portlet Factory. This is where the various back-end data sources are exposed as sets of reusable services. Remember that Workplace for Business Strategy Execution utilizes Web services when connecting to data sources. WebSphere Portlet Factory provides useful Builders that help you quickly wrap your existing applications as Web services without intensive development effort.

The next layer of the diagram illustrates the Portal server framework that powers both Workplace for Business Strategy Execution Enterprise edition and, under the covers, Workplace for Business Strategy Execution Team edition. The Portal server provides a container for the portlets and handles security, the user directory, and collaboration features, like instant messaging.

The next layer illustrates the dashboard-specific components and features included in Workplace Dashboard Framework. Refer to Figure 6-3 to see a snapshot of the components.

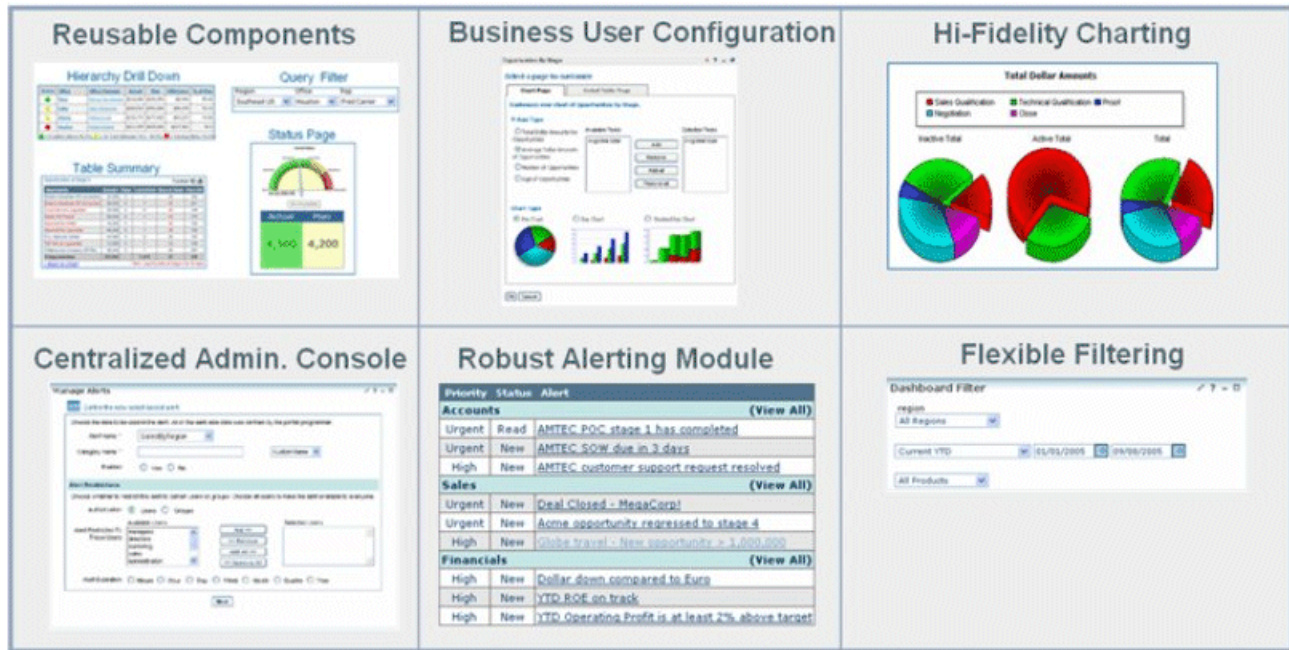


Figure 6-3 IBM Workplace Dashboard Framework components

As you can see in Figure 6-3, there are six key components to the Framework:

- ▶ Reusable components (that is, Builders)
- ▶ Business User configuration
- ▶ Hi-Fidelity Charting
- ▶ Dashboard Administration console
- ▶ Alerting Module
- ▶ Flexible Filtering

The final layer is the dashboards themselves. There are currently two pre-built dashboards available from IBM: IBM Workplace Dashboard for Sales and IBM Workplace Dashboard for Executives. Most companies will find it of great interest to take a look at these pre-built dashboards, which are built using Workplace Dashboard Framework. Refer to 6.3.1, “IBM Workplace dashboards” on page 110 for a more detailed description of the two available dashboards.

6.3.1 IBM Workplace dashboards

Each of the dashboards contain pre-built portlets that display best practice Key Performance Indicators (KPIs). Each of the KPIs is related to a specific function (for example, sales or executive) and can be further tailored by industry (for example, manufacturing). In addition to demonstrating best practice portlets, each dashboard includes built-in filtering capabilities, browser-based configuration wizards, collaboration, and sample alerts. The dashboards are also all fully localized and include sample users and roles. IBM Workplace dashboards are all built using Workplace Dashboard Framework and IBM WebSphere Portlet Factory technology. As such, they take advantage of all the features and benefits of this underlying technology, such as native WebSphere Portal integration and multi-source data integration. Companies can customize the portlets to leverage their own unique data and processes by using the Builders in WebSphere Portlet Factory.

IBM currently offers the following Workplace dashboards.

IBM Workplace Dashboard for Executives

IBM Workplace Dashboard for Executives (see Figure 6-4 on page 111) provides key executives with insight into the metrics and Key Performance Indicators (KPIs) that align with their roles and responsibilities. This dashboard includes portlets that represent best practice KPIs, such as:

- ▶ Earnings before interest tax and depreciation (EBITDA)
- ▶ Headcount
- ▶ Internal Hires
- ▶ Time to Fill Positions
- ▶ Employee Turnover

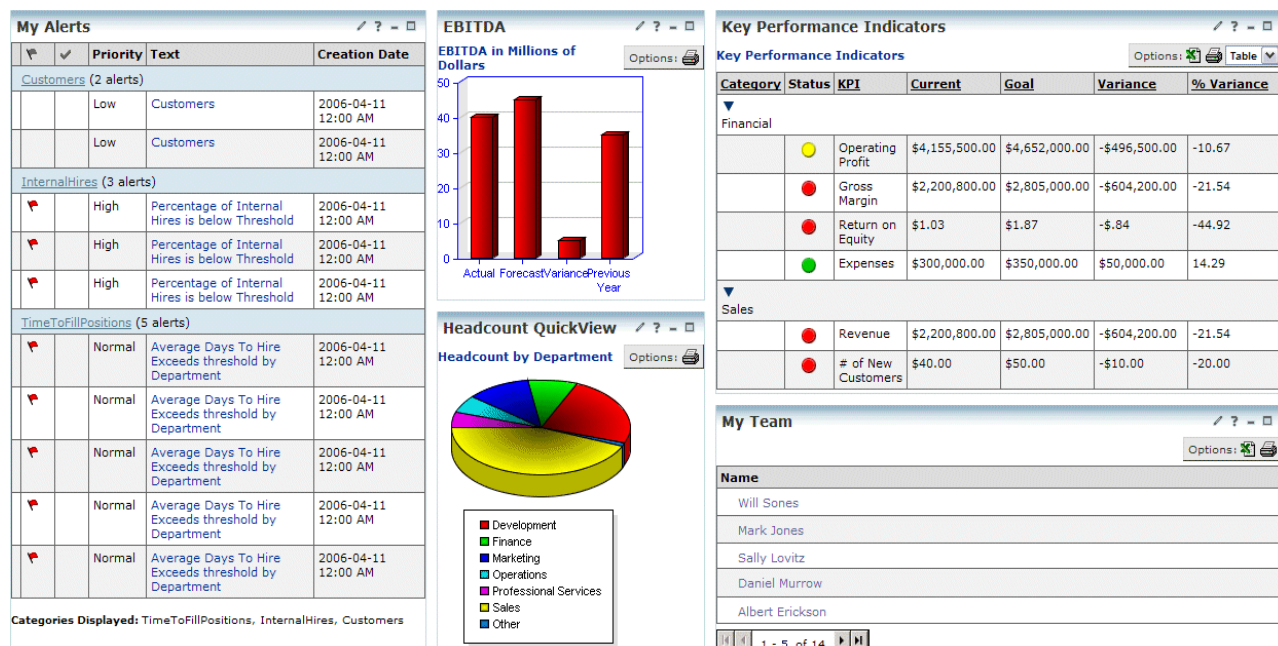


Figure 6-4 Home page of the IBM Workplace Dashboard for Executives

IBM Workplace Dashboard for Sales

IBM Workplace Dashboard for Sales (see Figure 6-5 on page 112) arms sales executives with the information and insight they need to effectively manage their sales teams and close deals. This adaptive dashboard displays the appropriate information according to the role(s) of the user.

Best practice KPIs include:

- ▶ Top Opportunities
- ▶ Rep Performance
- ▶ Opportunities by Stage
- ▶ Client Satisfaction

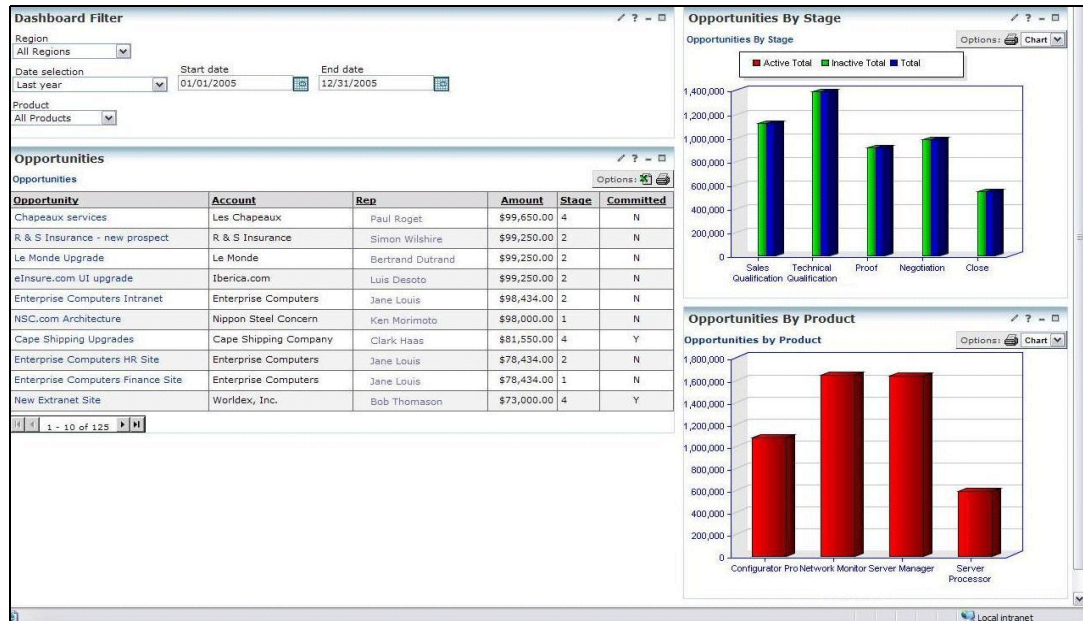


Figure 6-5 Forecast page for IBM Workplace Dashboard for Sales

6.4 ITSO Insurance Builds a Domino Portlet Using the IBM Workplace Dashboard Framework

This section does not cover deep technical detail on Workplace Dashboard Framework; rather, it will provide a high level overview on how one organization used the tool. For the detailed how-to guide, please refer to product documentation.

ITSO Insurance has matched their objectives to the data sources they need to leverage, and they have decided to build a custom Domino Portlet. Their first task will be to create services that wrap the desired Domino views and forms. Their second task will be to build the user interface by leveraging the Builders within Workplace Dashboard Framework. The following section will illustrate the steps for building a dashboard portlet and what that portlet will look like deployed to a Portal page.

IBM Workplace Dashboard Framework

ITSO Insurance begins by opening up the WebSphere Portlet Factory Designer tool, which is a plug-in to Eclipse and the IBM Rational® Software Development Platform.

Attention: To see more detailed information, refer to the product documentation at:

<http://www-306.ibm.com/software/awdtools/developer/application/index.html>

The WebSphere Portlet Factory home page at:

<http://www-306.ibm.com/software/genservers/portletfactory/>

Articles, such as the following article on developerWorks®, may also provide some tips on how to proceed:

<http://www-128.ibm.com/developerworks/websphere/zones/portal/portletfactory/proddoc.html>

The basic development environment

1. With their project open, as shown in Figure 6-6, ITSO Insurance begins the process of developing their new dashboard portlet. As displayed in Figure 6-7 on page 114, they first need to create a new portlet container called a Model. The Model will hold all of the Builders that will generate the portlet code.

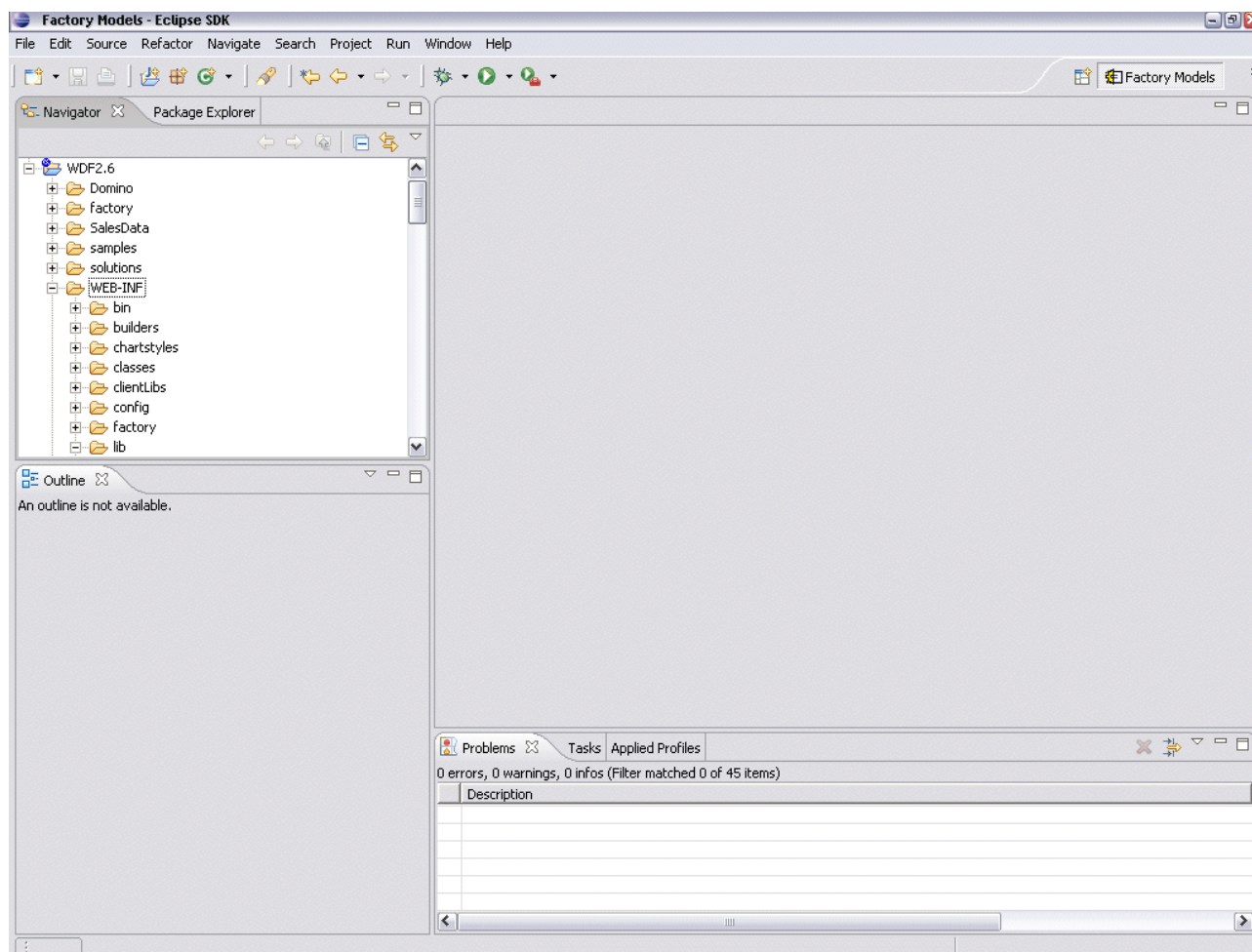


Figure 6-6 Development starts by opening the Portlet Factory plug-in to Eclipse or Rational Application Developer

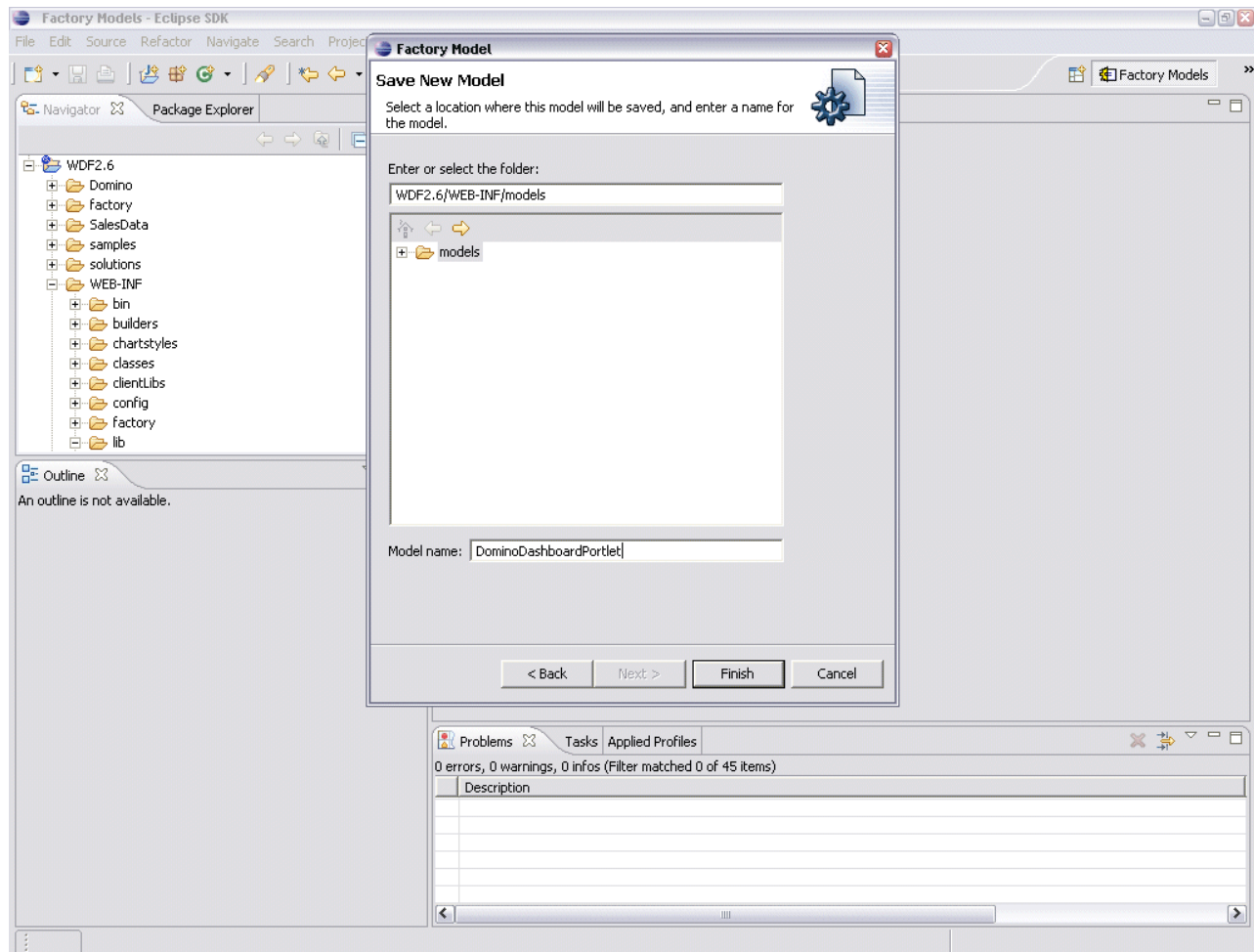


Figure 6-7 Creating a new Model called the DominoDashboardPortlet

2. Once the Model is created, the next step is to add Builders to the Model, which will create the desired portlet code. There are over 150+ Builders to choose from, ranging from Builders that automate integration with back-end systems, to simple page control Builders that create user interface controls, like buttons and links. Since ITSO Insurance wants to create a Domino portlet for their dashboard, they will start by selecting the Domino View Builder, as shown in Figure 6-8, which automates the processing of accessing data from Domino.

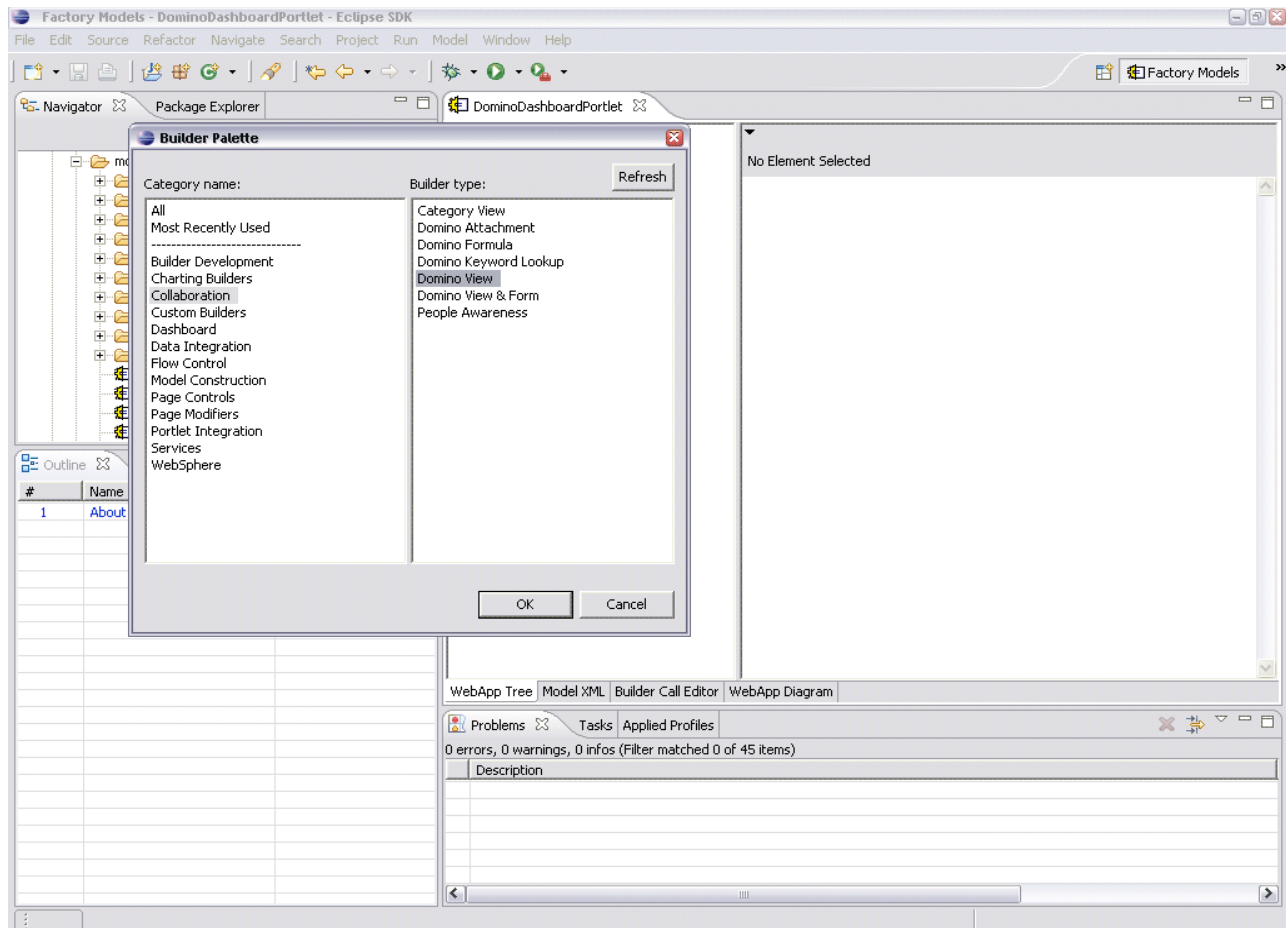


Figure 6-8 Selecting the Domino View Builder

3. Once the appropriate Builder is selected, the developer then populates the required inputs using the Builder's easy to use interface, as shown in Figure 6-9.

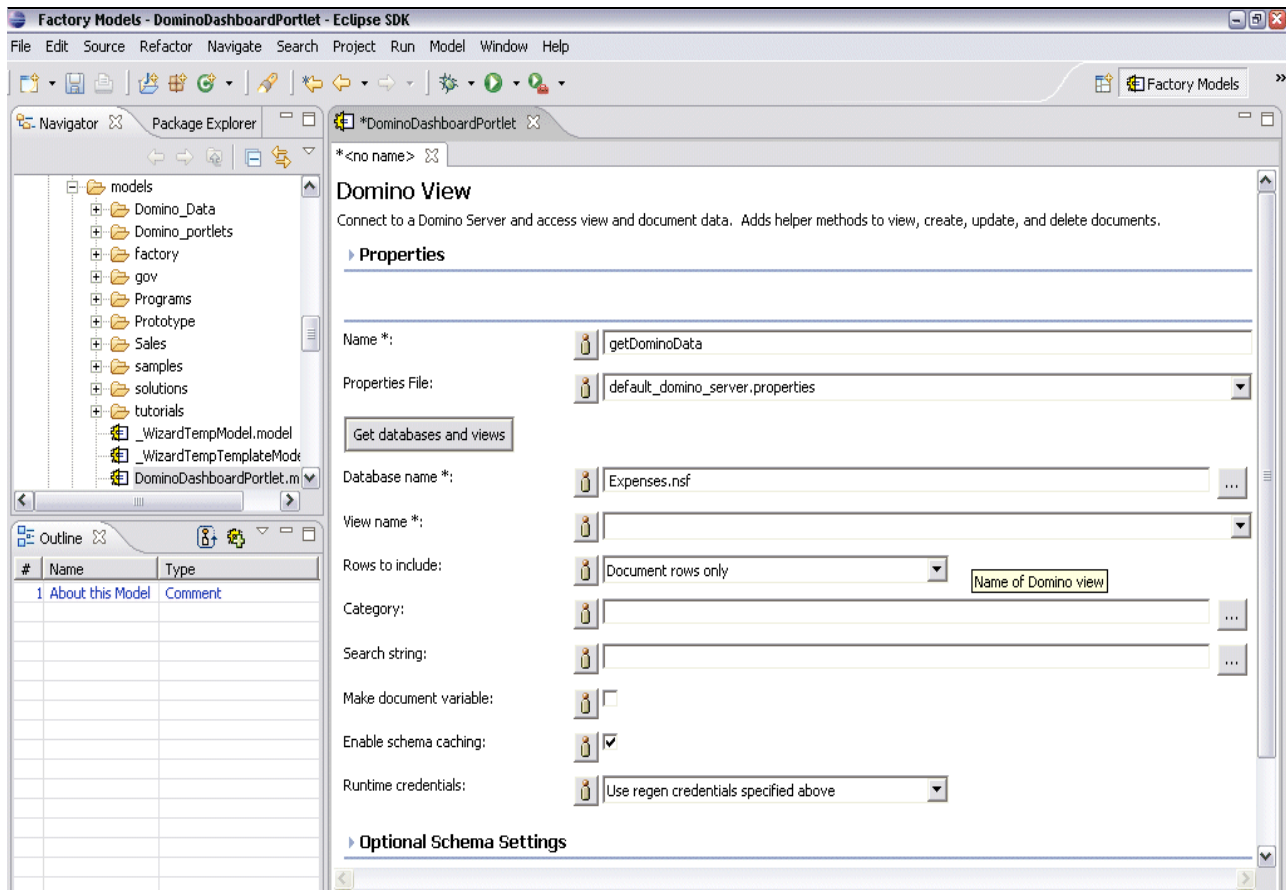


Figure 6-9 Populating the Domino View Builder

4. By filling out a few simple fields, the Builder can create the connection to Domino. You will notice that the Builder provides various pickers and selection inputs that ease development. As shown in Figure 6-10 on page 117, ITSO Insurance can easily pick the specific Domino database (Expenses) and view name (Expense reports by submitter (totaled)) that they would like to access.

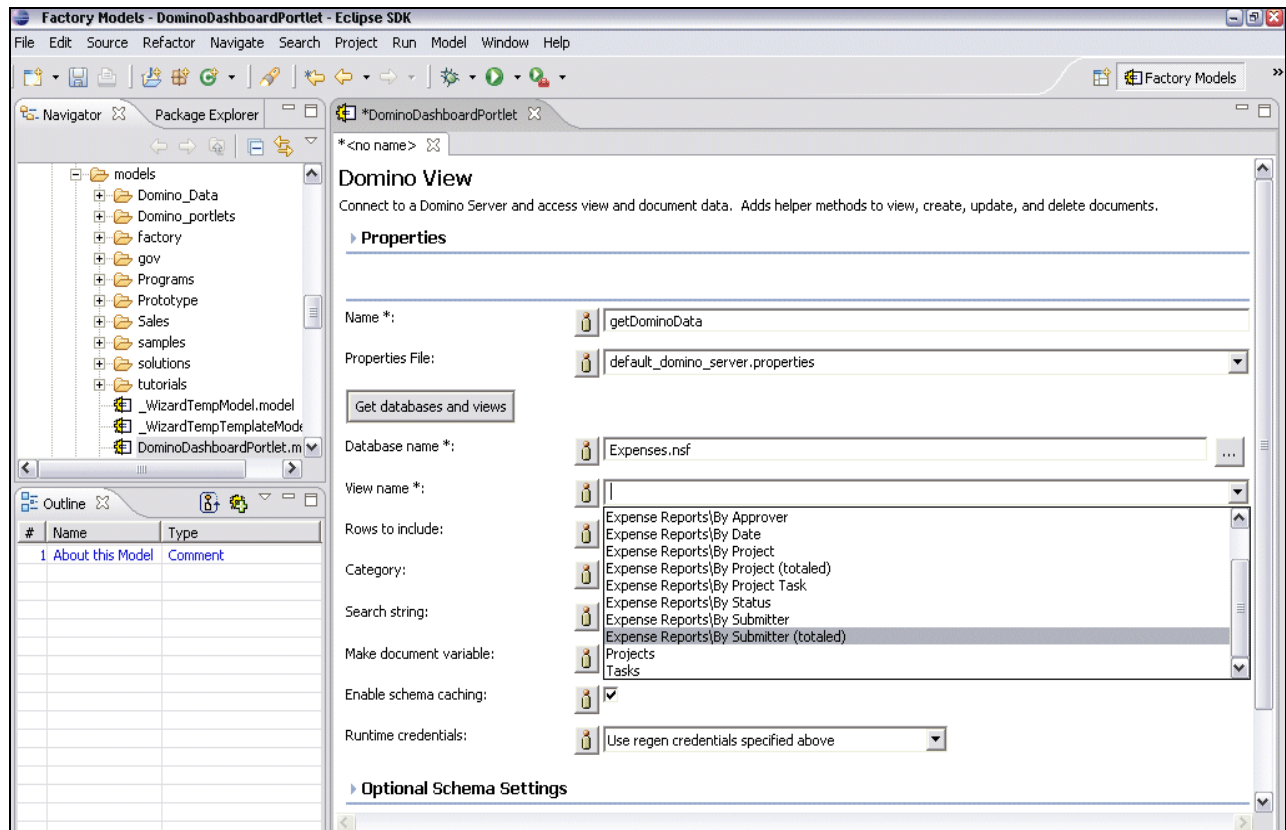


Figure 6-10 Filling out Builder Inputs

- Once the Builder is saved, it generates the code necessary to access the Domino view, as shown in Figure 6-11. It includes a schema that describes the data, an XML variable that will hold the data, and a data service that can be invoked to retrieve the data and place it in the variable.

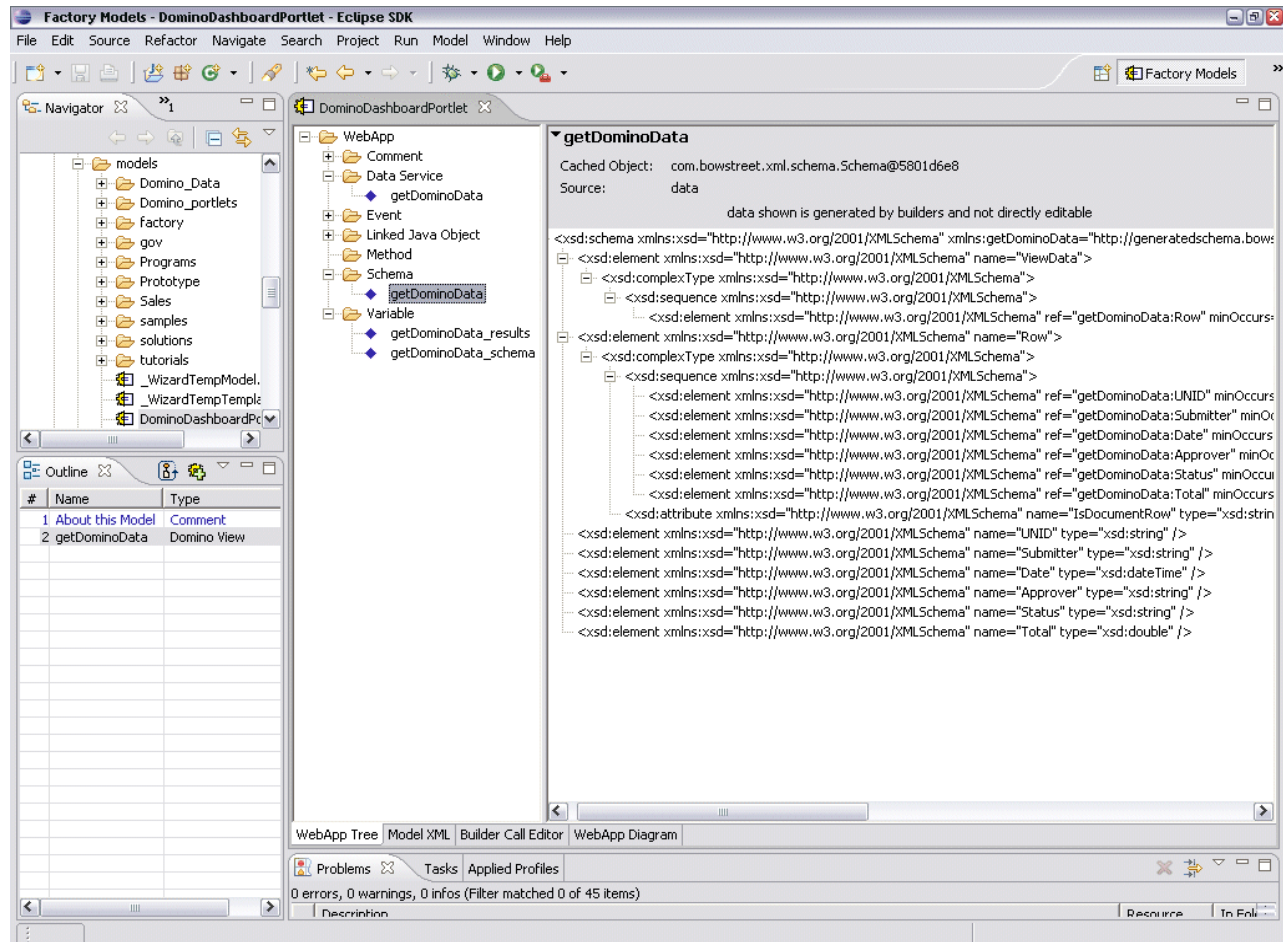


Figure 6-11 Code generated by the Domino View and Form Builder

- Now that ITSO Insurance has service-enabled the Domino View they need to access, the next step is to build the portlet user interface by using some of the Builders within Workplace Dashboard Framework. As shown in Figure 6-12 on page 119, ITSO Insurance selects the "Summary Drill Down" Builder, which automates the creation of summary charts and tables.

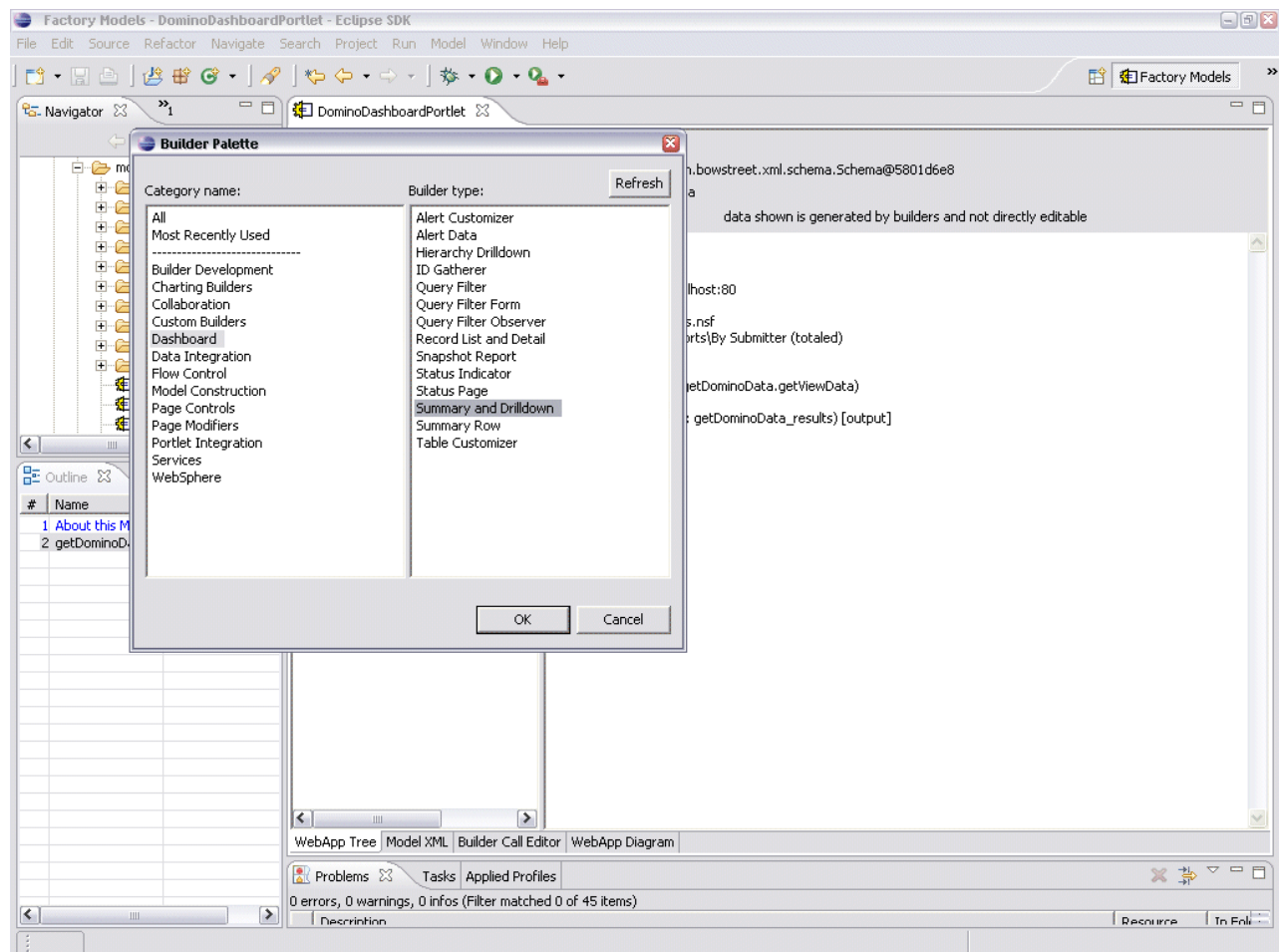


Figure 6-12 Builders included in Workplace Dashboard Framework Version 2.6

- Again as indicated in Figure 6-13, ITSO Insurance fills out the Builder inputs, first using a selection window to choose an initialization action from the data service created by the Domino View Builder. They also decide to display the data in both a summary chart and a summary table. These components will be located on separate pages, with tabs to navigate between them.

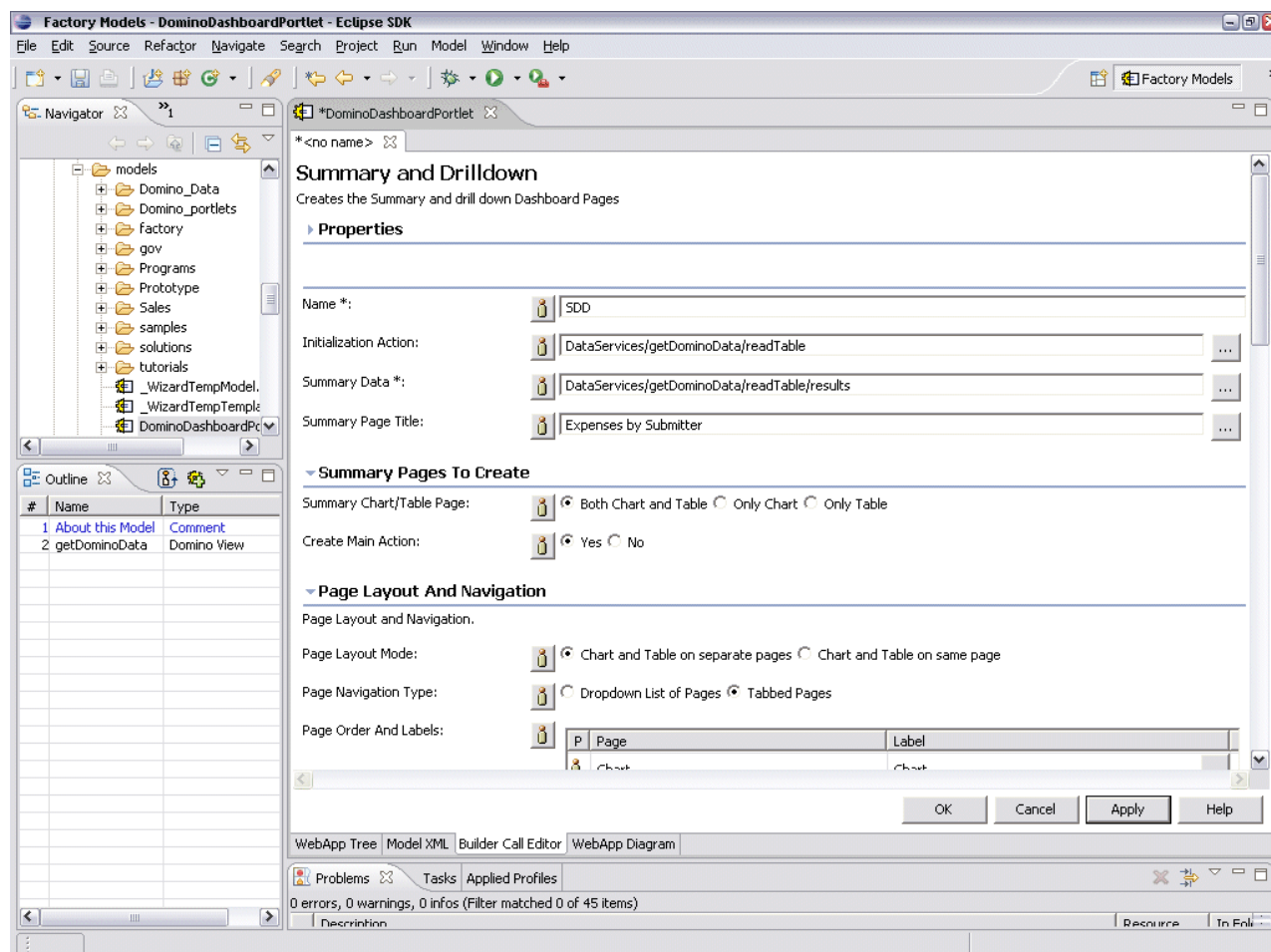


Figure 6-13 Populating inputs in the Summary and Drill Down Builder

- In the chart properties section of the Builder shown in Figure 6-14 on page 121, ITSO Insurance selects a pie chart, with Submitter displayed on the x-axis, and Total on the y-axis. This Builder also enables ITSO Insurance to easily add other features to their portlet, such as a toolbar that enables users to print the portlet and to export the data to Excel.

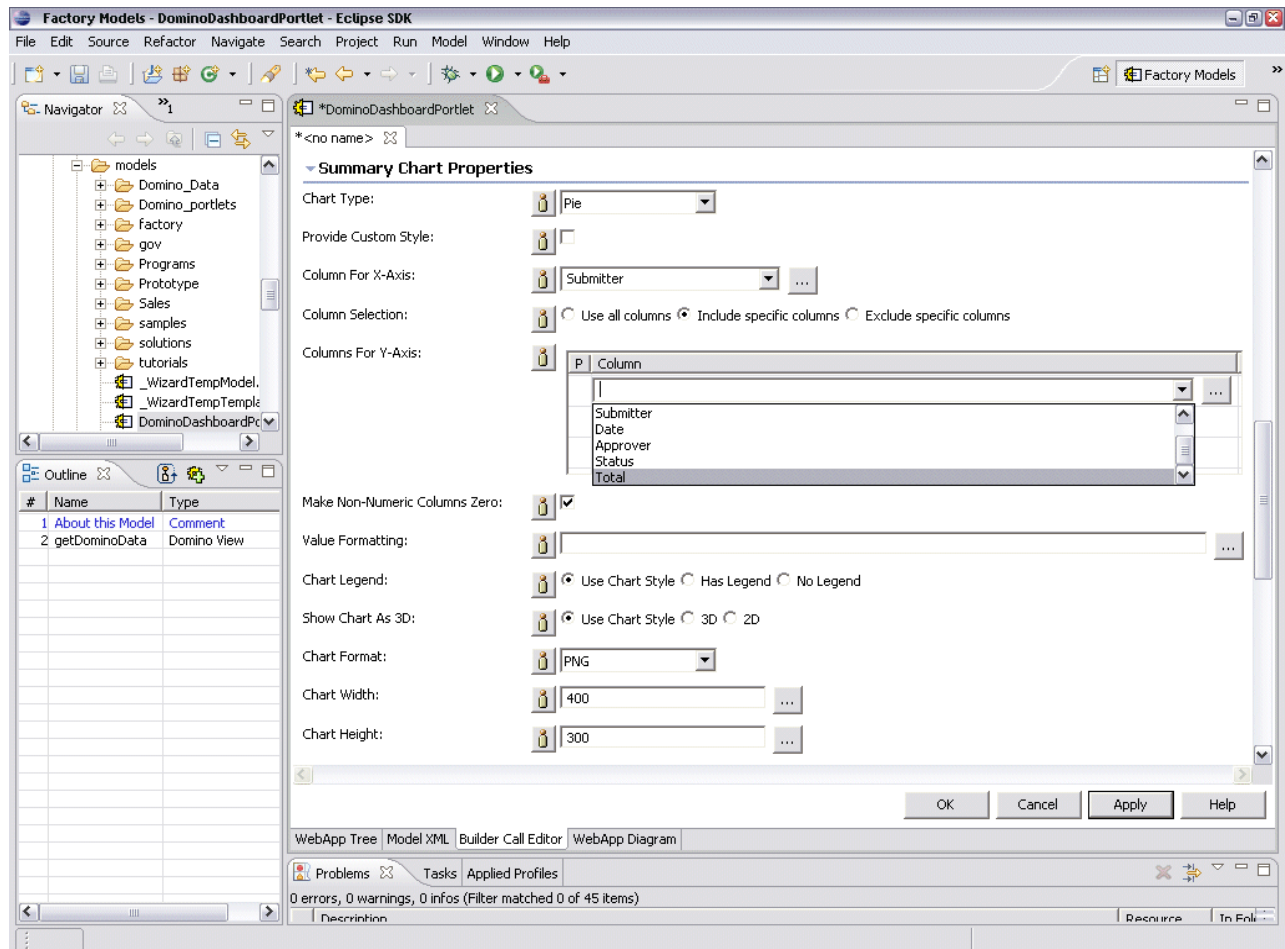


Figure 6-14 Specifying chart properties in the Summary and Drill Down Builder

9. ITSO Insurance then saves the Builder and tests the portlet right from the tool, as shown in Figure 6-15.

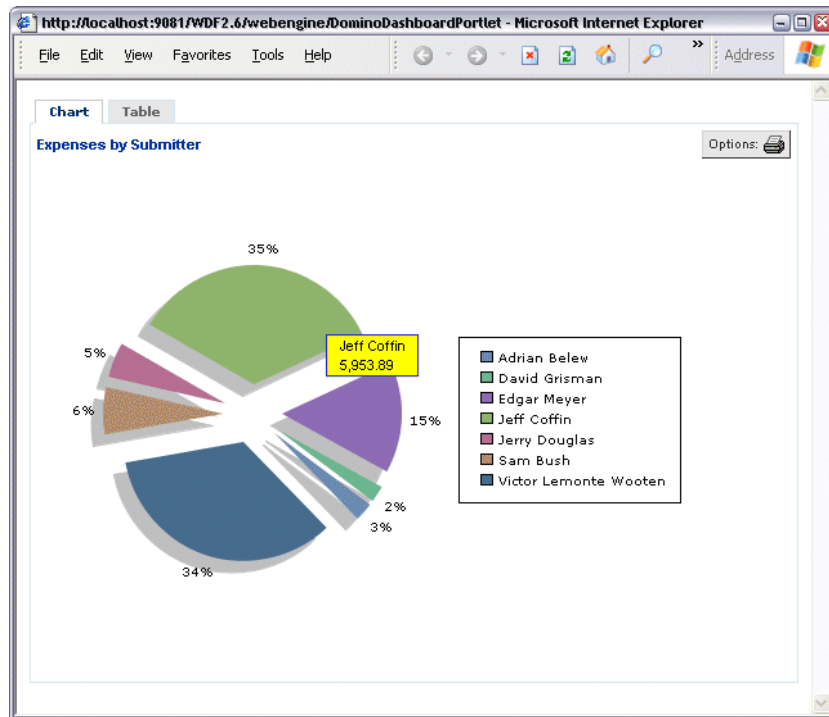


Figure 6-15 Testing the Domino portlet without having to deploy it first to Portal

10. The next step is to enable this Model to be deployed as a portlet. To do this, ITSO Insurance simply needs to add one additional Builder to their Model, called Portlet Adapter. As shown in Figure 6-16 on page 123, they simply need to specify a title for their portlet.

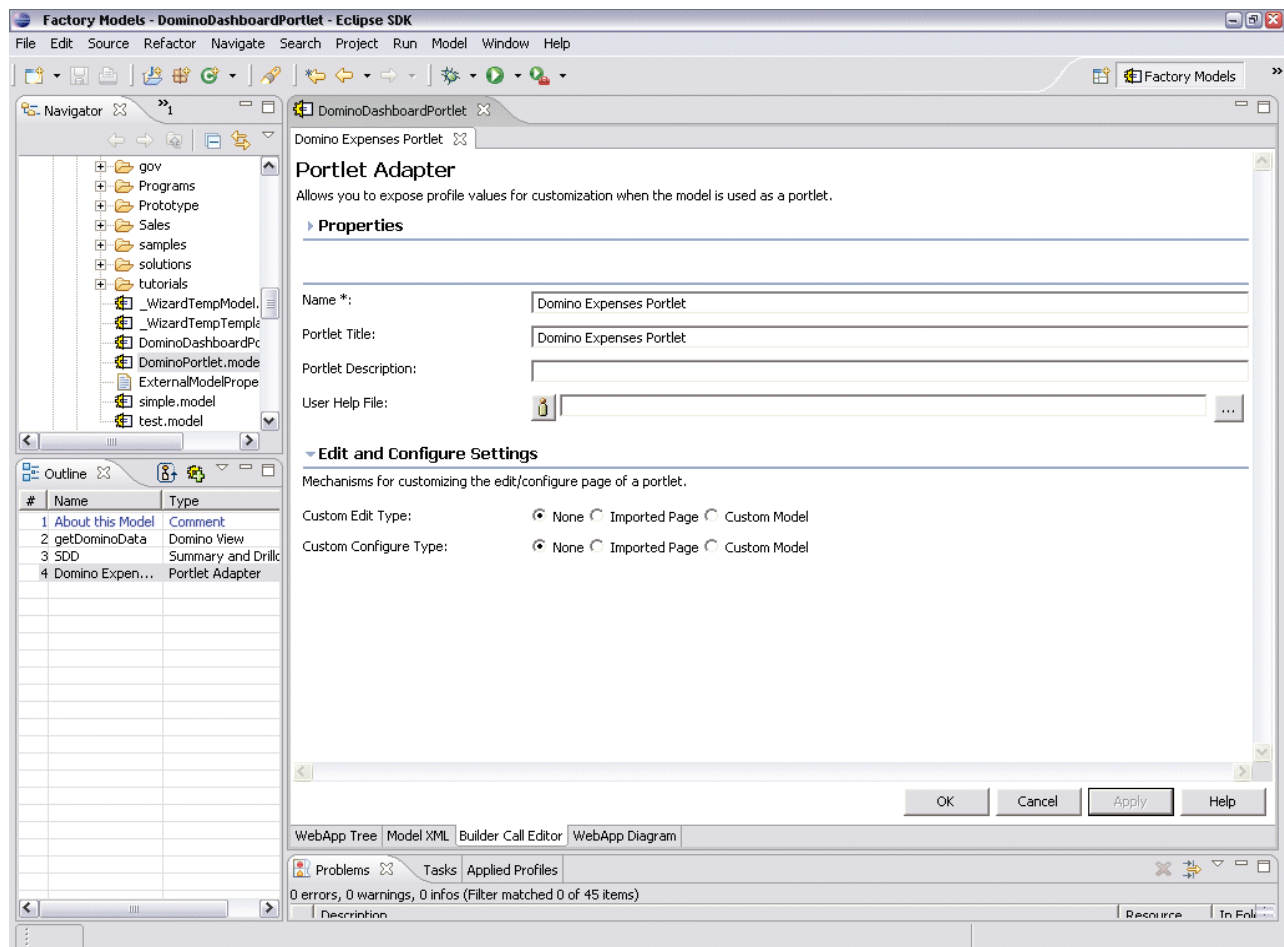


Figure 6-16 Adding the Portlet Adapter Builder

11. The final step is to deploy the portlet on the Portal server. This is accomplished by simply right-clicking the project and selecting **Rebuild War** → **Rebuild Portlet Wars**. The portlet can then be placed on the appropriate portal page (see Figure 6-17).

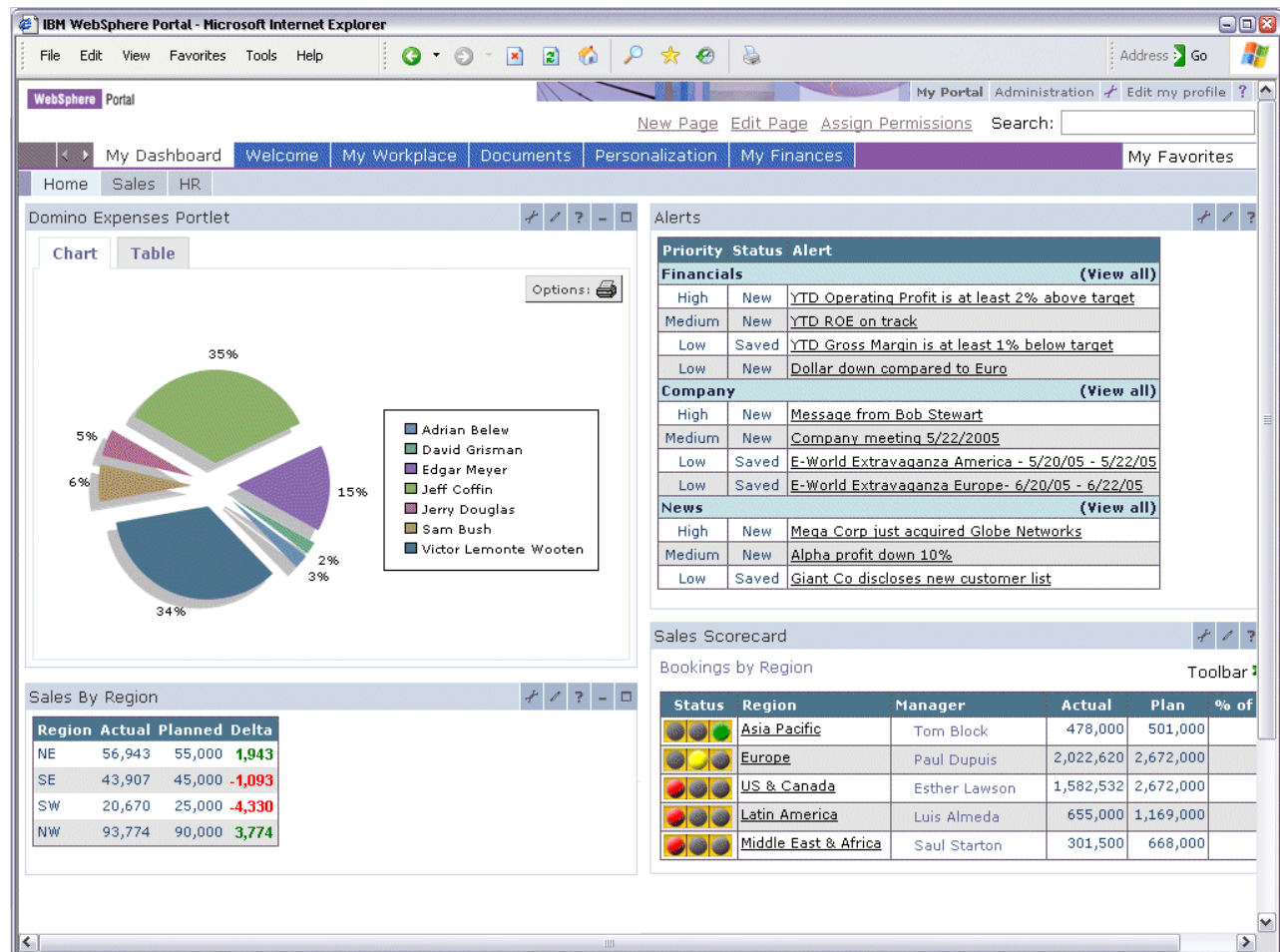


Figure 6-17 The new Domino portlet is now incorporated into the dashboard

ITSO Insurance has created a very useful dashboard portlet that displays expenses by submitter. While the screen captures above do not delve into the details, it gives a sense for how much complexity has been removed from the portlet development process by using IBM Workplace Dashboard Framework. With this example in mind, you should be able to envision building a complete dashboard for your company. To see some additional examples of the type of dashboards you can create using Workplace Dashboard Framework, you can view several flash demos by visiting:

<http://www-142.ibm.com/software/workplace/products/product5.nsf/wdocs/dashboardslibrary>

Some sample Builders

Here we discuss some sample Builders.

Alert Builders

- ▶ Alert Customizer: Exposes a users alert notification, threshold, and subscription settings so these can be easily customized and saved.
- ▶ Alert Data: Identifies data in a service model and makes it available for use in alerts.

Filtering Builders

- ▶ ID Gatherer: Helps gather IDs (for example, Office ID and Region ID) for a logged in user. Used in conjunction with the Query Filter Builders.
- ▶ Query Filter: Enables easy creation of data filters (for example, date, product line, and region) that work across all portlets on the page and even across all portlets in the dashboard.
- ▶ Query Filter Observer: Works in conjunction with the Query Filter to display the appropriate data.
- ▶ Query Filter Form: Creates a form to set filters in session.

Portlet Patterns

- ▶ Hierarchy Drill Down: Creates a series of pages and enables drill down through a hierarchy of data.
- ▶ Status Page: Provides graphical indication of a metric against a goal, typically, a gauge chart or a tabular format.
- ▶ Record List and Detail: Displays a tabular list of records and enables drill down to record detail.
- ▶ Summary and Drill Down: Creates chart or table pages, drill down behavior, and navigation between pages (tabs or drop-down).
- ▶ Table Customizer: Creates a Customizer for table data, exposing features such as sorting and reordering columns.

UI Patterns

- ▶ Snapshot Report: Takes existing top level portlet pages and arranges them into a report view that summarizes each page.
- ▶ Status Indicator: Automates the highlighting and styling of data values to show status or alerts based on some logic.
- ▶ Summary Row: Adds a summary row to a table with various options for each column.



Data sources

This chapter provides the Workplace for Business Strategy Execution system administrator guidance on setting up and using data sources. This chapter describes the following topics and provides additional references for more comprehensive information:

- ▶ Data acquisition using Web Services
- ▶ Objective and Initiative Aggregation
- ▶ Importing data using spreadsheets

7.1 Data acquisition

Data acquisition is a central part of Workplace for Business Strategy Execution. The product has been designed to accommodate a variety of data sources, as each objective and initiative can potentially be driven by a different data source. The goal of Workplace for Business Strategy Execution allows organizations to leverage their current data structures, whether that be enterprise systems, databases, or even spreadsheets. In this chapter, you will learn how to leverage your company's data in Workplace for Business Strategy Execution.

Data acquisition allows you to integrate information from external sources into Workplace for Business Strategy Execution. This is called *Data Acquisition*. The data is used thereafter as input data for *Actual Values* in objectives and initiatives.

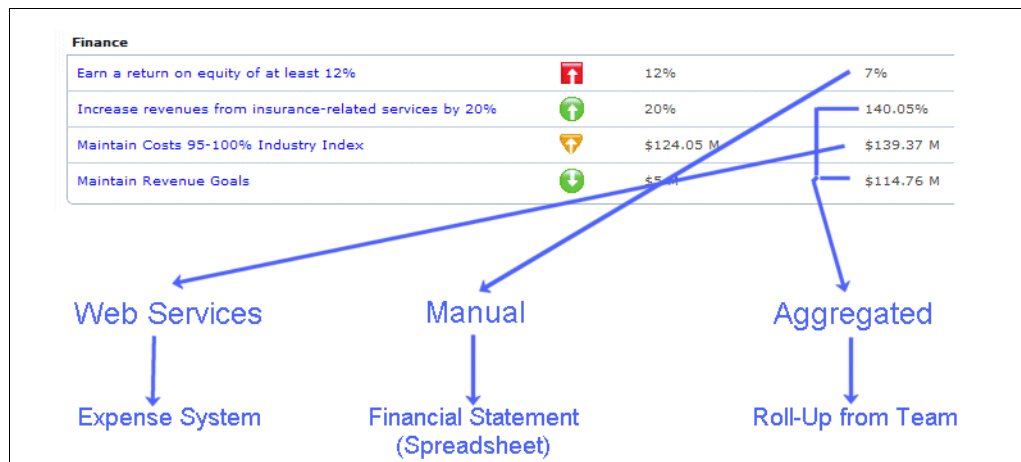


Figure 7-1 Every objective and initiative can be driven by a different data source

Note: Workplace for Business Strategy Execution connects to external data sources using Web services. Throughout the chapter, the term *External Data Sources* refers to data sources which Workplace for Business Strategy Execution connects to using a Web service.

For more on external data sources, see “External sources” on page 79.

Data sources defined

A data source is an information repository. In Workplace for Business Strategy Execution, data sources are used to provide the actual value figures for an objective or initiative. Workplace for Business Strategy Execution can integrate with a data source via Web services or by importing data from a spreadsheet. Data sources integrated via Web services are called External Data Sources.

Data sources are used in the data acquisition process

The data acquisition process refers to the operations performed by Workplace for Business Strategy Execution and the administrator for setting up and consuming the data source(s).

Connecting to data sources

There are several methods for acquiring data in Workplace for Business Strategy Execution:

- Create a new External Data Source by identifying a Web service (specifically, a WSDL file) that will provide the data. This source could be utilized by many objectives or initiatives. A

Data Acquisition Task will also need to be set up to continually retrieve new actual values. External data sources and data acquisition tasks can only be set up by an Administrator.

- ▶ Manually enter the actual value data. Also includes importing data from a spreadsheet. This is usually done by the objective/initiative owner, though it can be done by an Administrator.
- ▶ Have the objective or initiative's actual value be based off the actual values of other objectives or initiatives. This is known as *Aggregation*. This is usually done by the objective/initiative owner, though it can be done by an Administrator.

External data sources have to be defined by the Administrator

- ▶ The actual value origination point(s)
- ▶ Characteristics of how to connect and gather the value(s)

7.1.1 Purpose of data acquisition

Here we discuss the purpose of data acquisition.

Who uses data acquisition?

Almost anyone who uses Workplace for Business Strategy Execution is in some way using a data source. Table 7-1 classifies user types based upon their data acquisition roles and responsibilities.

Table 7-1 Data sources: roles and responsibilities of different users

| User type(s) | The user has these roles and responsibilities | Example or additional information |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Workplace for Business Strategy Execution Administrator | <ul style="list-style-type: none"> ▶ Creates external data sources ▶ Schedules the data acquisition task. ▶ Can enable tracing and logging if necessary for troubleshooting purposes. ▶ May use the "Test Service" button to try out the service. | This user must be in the WPSADMIN group. |
| Managers, business executives and others defined by the administrator | <ul style="list-style-type: none"> ▶ Use data sources to supply values in objectives and initiatives (see 7.1.1, "Purpose of data acquisition" on page 129). ▶ Data sources must be created prior to use by those creating objectives or initiatives. ▶ Can manually enter or import data. | Access must be defined by the administrator. For more on defining access and permissions, see 8.3, "Access policies and user access policies" on page 159. |

Important: A data source must be created before it can be used for data acquisition.

7.1.2 Data acquisition methods

There are three ways to use information, or acquire data, into Workplace for Business Strategy Execution. They are explained in Table 7-2 and referenced with examples.

Table 7-2 Data acquisition methods cross-reference

| Data acquisition method | How this works | Example or further described |
|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data may be manually entered. | Users specify values needed by the specific objective or initiative. | The user creates an objective, and supplies the information manually. See 5.2.3, “Data sources for reporting actual values” on page 74 for more information. |
| Data can be introduced through the rollup resulting from other objectives and initiatives. | This is called <i>aggregate from alignment</i> . | For more on alignment, see 4.3.3, “Linkages and dependencies” on page 52. |
| Web services. | Actual values are transmitted to Workplace for Business Strategy Execution using a Web Services Definition Language (WSDL) file. | For more on Web services, consult the Web Services Description Language (WSDL) 1.1 specification at http://www.w3.org/TR/wsdl . |

7.1.3 Data acquisition components

Important: In the rest of 7.1, “Data acquisition” on page 128, *Data Acquisition* will specifically refer to the process for integrating with data provided by a *Web Service*. Data acquisition will not refer to end-user methods of aggregation and manual entry.

There are two parts to data acquisition, the user interface and the back-end runtime (see Figure 7-2 on page 131). Although creation is an administrative function, the back end component performs data extraction by calling the Web service.

- ▶ The user interface gathers query data from a WSDL to retrieve values from the data source. It is also used to specify where to store the retrieved information. For more on the user interface, see Chapter 5, “Creating objectives, setting targets, and tracking progress” on page 63.
- ▶ The back-end component is an asynchronous task. The task may be scheduled to run at a specific time and date through the scheduler. When the task is run, actual values will be retrieved from the data sources and stored in Workplace for Business Strategy Execution.

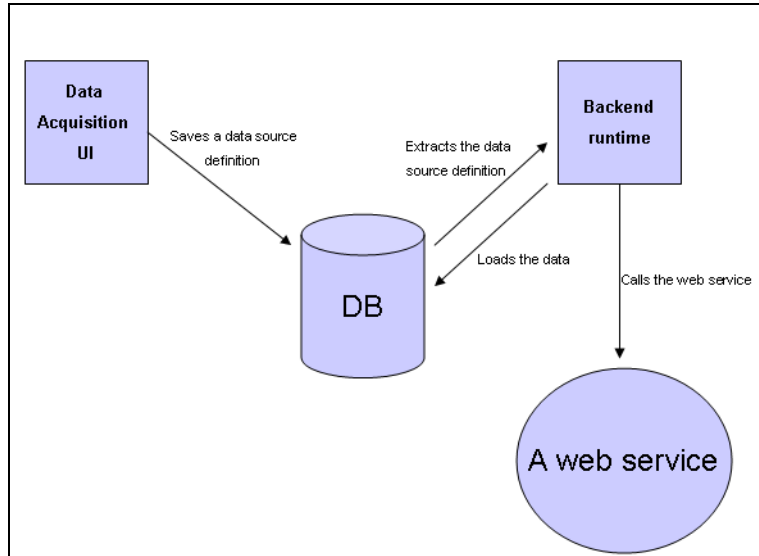


Figure 7-2 Data acquisition components

Security Restriction: No Web services security is implemented in Workplace for Business Strategy Execution Version 1.0. Only plain XML text is transmitted over the wire, with no authentication required. We recommend using data acquisition in a secured intranet environment. Please refer to Appendix A, “Looking forward” on page 195 for more details.

7.1.4 Data acquisition technical details

- ▶ Every external data source must be accessed by a Web services (WSDL) invocation.
- ▶ Data source parameters must be valid in order to obtain expected values.
- ▶ The process uses JAX-RPC and IBM SOAP API together to invoke Web services.
- ▶ The process also uses SAAJ to manipulate the SOAP request and parse the SOAP response.
- ▶ In this release, arrays are not a valid return type.

Tip: For more information about JAX-RPC, consult the following online resource, JSR 101: Java APIs for XML based RPC:

<http://jcp.org/en/jsr/detail?id=101>

The SOAP with Attachments API for Java (SAAJ) provides a standard way to send XML documents over the Internet from the Java platform. SAAJ 1.3 EA (with support for SOAP 1.2) is shipped in Java WSDP 2.0. This release is based on the specification for the SOAP with Attachments API for Java (SAAJ) 1.3 (which is not a final draft). For more information about the SAAJ specification, please see JSR 67 at the Java Community Process Web site:

<http://jcp.org/aboutJava/communityprocess/maintenance/jsr067/index2.html>

7.1.5 Creating a data source process

Although Web services allow for many choices with respect to data sources, the creation process is usually the same.

Important: The back-end data acquisition process supports only SOAP binding. However, the user interface can support other bindings, including the HTTP GET/POST. Be advised that the user interface does not disable selection of unsupported back-end bindings.

Also, as there is no support for arrays in Workplace for Business Strategy Execution Version 1.0; one value is allowable as a return value for a given Web service.

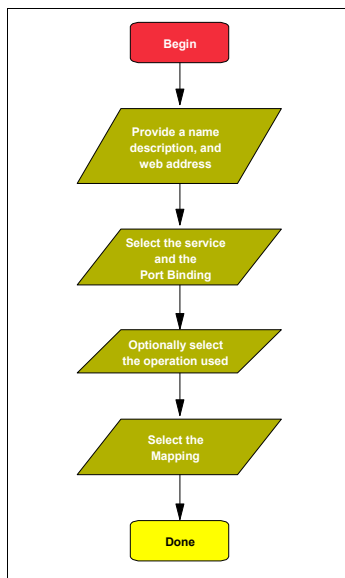
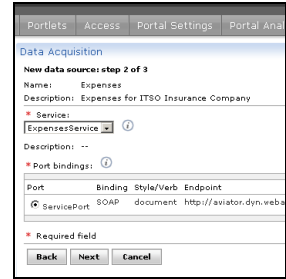
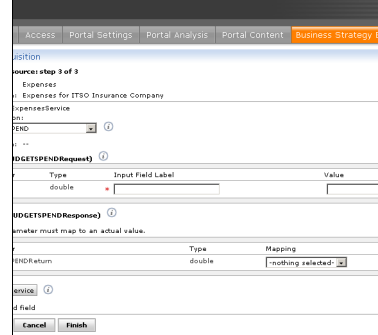
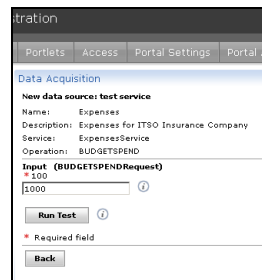



Figure 7-3 Administrative process overview for creating a data source.

The process is explained in Table 7-3. As there are many types of Web services to choose from, you may use this stage table to help plan and gather information you need in preparation for the actual creation process.

Table 7-3 Creating a data source using a Web Service

| Stage | Description | Further explained |
|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| The administrator provides three things: a name, description, and the Web services (WSDL) file. | <ul style="list-style-type: none"> ► The unique name appears in the Acquire from external source list when a user chooses to acquire actual values from an external source. ► The Description appears in the Data Sources table and is for administrator purposes only. ► The Web address field can either contain the WSDL file or the file path name location on the remote server. | |

| Stage | Description | Further explained |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| After selecting the service to use for the data source, select the Port Binding to use for the data source in the port bindings table. | Data acquisition only supports SOAP bindings. |  |
| <p>At this stage, there may be some variance depending upon the Web service characteristics.</p> <ul style="list-style-type: none"> For each input parameter, supply an input field label and value. In the mapping column of the output table, select an actual value mapping with a parameter. Select an Action Type. Select Action Time, if desired (optional). | <ul style="list-style-type: none"> The service may or may not support input parameters! To supply a colon ":" with a label, append a colon to the label in the input field label field. In the output mapping section, ensure that one parameter maps to an actual value. Unless you choose an action time parameter, action time is set to the scheduler task time. |  |
| You may use the Run Test button (optionally) to test the Web service. | <ul style="list-style-type: none"> Choose Test Service, then choose Run Test and supply any required input parameters. Verify that the information returned is as you expect, then click Back and save the data source. |  |
| <p>When complete, the Web service can be used. In this case, the returned value is shown on the right side. Using the Test Service button is recommended to ensure that the Web service works and can be used for the data source.</p> | | |
|  | | |

Tip: If your organization does not have Web services or needs help building them, IBM WebSphere Portlet Factory provides tools to help you connect to your data, build portlets, and generate Web services. Here are some of the data sources WebSphere Portlet Factory can connect to:

- ▶ Lotus: Easily create robust composite applications and portlets that leverage existing Domino data and applications.
- ▶ SAP: Quickly extend existing SAP business processes and data to portal-based composite applications.
- ▶ PeopleSoft: Quickly and easily create, customize, deploy, and maintain robust portlets and composite applications that leverage existing PeopleSoft business processes and data.
- ▶ Siebel: Quickly extend existing Siebel business processes and data to portal-based composite applications.
- ▶ Databases: Rapidly build database-driven Web applications and portlets that enable end users to search, view, edit, and delete database data.
- ▶ Web Services: Easily create Web services and Web service-driven composite applications and portlets.
- ▶ Graphing: Rapidly create powerful, interactive graphs that display data from a variety of back-end data sources, including SAP R/3, Lotus Domino, databases, Web services, SAP Business Warehouse, and beans.

7.1.6 Scheduler interaction with the data source

Generally, you will want to specify control over running the Web service. This is easily done with the scheduler. The scheduler is an administrative function used to schedule events. This is covered in greater detail in 8.7, “Alerts and events” on page 174

How this works

- ▶ At the scheduled time, the data acquisition activity does these things automatically.
- ▶ All of the objectives and initiatives configured with the external data source are scanned.
- ▶ For each objective and initiative, the Web service is invoked.
- ▶ The actual value and action time information is saved to the Workplace for Business Strategy Execution system, in a database.

7.1.7 ITSO Insurance: creating a data source for an IBM Lotus Domino Web service

In earlier chapters, we talked about a large insurance company, ITSO Insurance. ITSO Insurance is interested in using Workplace for Business Strategy Execution. As discussed earlier, their organization has several hundred data sources that may be used with Workplace for Business Strategy Execution. In this scenario, the ITSO administrator creates a data source to pull data into Workplace for Business Strategy Execution. Using Web services, ITSO Insurance can then use this information to support objectives and initiatives.

In this example, the administrator created a very simple Web service with IBM Lotus Domino Designer® Version 7, running on an IBM Lotus Domino server. The Web service returned an expense amount (number).

Note: The sample Web service and sample Domino database used in this example have been provided for you to use in the Appendix B, “Additional material” on page 199. In order to use the sample Web service and database, you will need to have Domino Designer 7.0 and Domino Server. The service and database are provided only so that you can test out the data source tools in Workplace for Business Strategy Execution, not for actual use.

Information needed for creation

In this case, the administrator needed the following:

- ▶ The location of the WSDL file
- ▶ Name of the wsdl file
- ▶ The input parameter(s) (This wEb service only has one input.)

The syntax for a Domino server-based URL is:

`http://<fullyqualifiedserver>:<port>/<file location>/<wsdl filename>?wsdl`

Following this example, our Web service is called *expenses* and it resides in a Domino database called *ws_exp.nsf*:

`http://aviator.dyn.webahead.ibm.com/ws_exp.nsf/expenses?wsdl`

Restriction: The URL specified above will not be accessible for your use. If you would like to try out the Web service on your own server, see Appendix B, “Additional material” on page 199.

Desired results

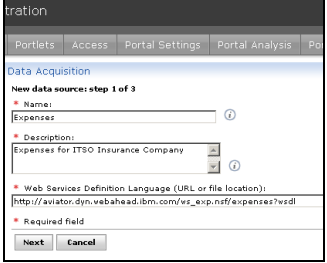
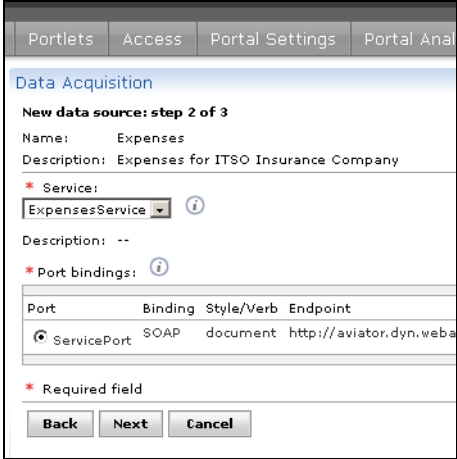
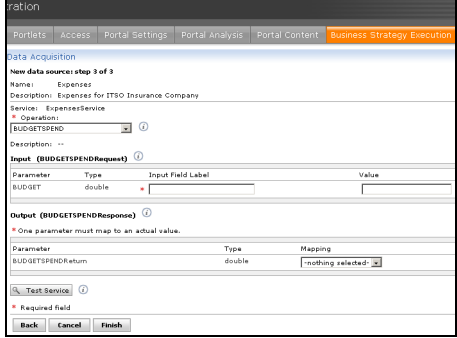
The user should be able to obtain an expense generated from the Expenses Web service and use it for ITS0 Insurance Company Workplace for Business Strategy Execution information.

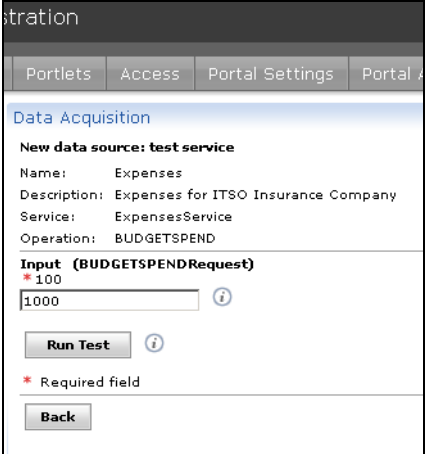
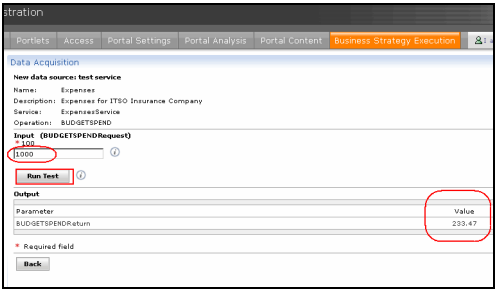
Steps

In this scenario, the administrator followed this process to create and use the data source. You may apply these steps to your own example, but keep in mind that this Web service was created solely for testing purposes. Web services can have many different characteristics.

Table 7-4 Example: creating the number generation Web service

| Process steps | Example or further described |
|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Web service has been created on a Domino Server Version 7. A portion of the WSDL file is shown here. | <pre> <?xml version="1.0" encoding="UTF-8" ?> <wsdl:definitions targetNamespace="urn:DefaultNamespace" xmlns="http://schemas.xmlsoap.org/wsdl/" xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"> <schema targetNamespace="urn:DefaultNamespace" xmlns="http://www.w3.org/2001/XMLSchema-instance" > <element name="BUDGET" type="xsd:double" /> <element name="BUDGETSPENDReturn" type="xsd:double" /> <complexType name="VALUEWITHDATETIME"> <sequence> <element name="DDATETIME" nillable="true" type="xsd:dateTime" /> <element name="LDATETIME" nillable="true" type="xsd:dateTime" /> <element name="NUMBER" type="xsd:double" /> <element name="NINTEGER" type="xsd:integer" /> <element name="NSTATUS" type="xsd:string" /> </sequence> </complexType> <element name="BUDGETSPENDWITHDATETIMEReturn" type="impl:VAL" /> </schema> <wsdl:message name="BUDGETSPENDRequest"> <wsdl:part element="impl:BUDGET" name="BUDGET" /> </wsdl:message> <wsdl:message name="BUDGETSPENDWITHDATETIMERequest"> <wsdl:part element="impl:BUDGET" name="BUDGET" /> </wsdl:message> </pre> |

| Process steps | Example or further described |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <p>Name the new data definition and select the appropriate Web services definition language file (WSDL).</p> |  |
| <p>Next, the administrator selected the Service and Port binding. In this release, always select SOAP.</p> <p>Choose Next to continue creating the data source.</p> |  |
| <p>The input and output parameters are shown on this window.</p> <p>The Operation BudgetSpend takes the input value (parameter) Budget, then it outputs (returns) the output parameter BudgetSpendReturn.</p> <p>One parameter <i>must</i> map to an actual value.</p> |  |

| Process steps | Example or further described |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <p>The administrator entered the value 1000 in order to test the Web service.</p> <p>Tip: Testing the Web service is recommended before going into production.</p> |  |
| <p>Lastly, he used the Run Test button to test the data source. Then, he saved the work by clicking Finish.</p> |  |

Tip: Data sources are used in setting targets. See 5.2.2, “Setting targets with the Target Scheduler” on page 67

Once the setup is complete, the administrator at ITSO Insurance sets up a Data Acquisition Task using the Scheduler that will run as frequently as needed to retrieve values from the data source. See 7.1.6, “Scheduler interaction with the data source” on page 134.

Now, the Web service is available to end users. The service will appear by given name to the end users when they are setting up their objectives. It will appear in the Properties view for objectives and initiatives, under the Data Source tab, and in the Enter Data Source drop-down list.

7.2 Linkages, alignment, rollup, and aggregation

Workplace for Business Strategy Execution allows linking between objectives and initiatives. Objectives and initiatives are covered in other sections of this text; however, administrators must know how these work together in order to properly grant permissions and assist with questions. Here are the basic rules.

- ▶ You may link an objective to an initiative.
- ▶ You may link an objective and initiative to another objective.
- ▶ Objectives can be pushed to others. All pushed objectives and initiatives have a linkage type of alignment.
- ▶ Objectives can be linked to other existing objectives or initiatives.
- ▶ Each objective or initiative has a corresponding status map.
- ▶ While initiatives can be linked to objectives, the data from an initiative cannot roll up to an objective. Likewise, the data from an objective cannot roll up to an initiative.

Viewing linkages using the Status Map

The status map provides a visual representation of linkages for objectives or initiatives as well as their status. The Status Map also allows viewing of objective and initiative details. For more on alignment and linkages, including Status Map, see “Alignment linkages” on page 79.

Alignment and linkages

There are two types of linkages: *alignment* and *dependency*.

Table 7-5 Alignment types described

| Type of linkage | Used for | Further described |
|-----------------|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Alignment | Actual values are rolled up from objectives or initiatives. | All pushed objectives must have an alignment linkage. |
| Dependency | No values are rolled up, but a cause-effect relationship exists among the linked objectives. | <ul style="list-style-type: none">▶ Actual values are not used in rollup.▶ Useful if you would like to monitor the status, but the values do not directly contribute. |

7.2.1 Aggregation

Data relative to objectives and initiatives must be processed to correctly reflect and update information used for objectives and initiatives. This process is called *aggregation*.

How aggregation works

For both objectives and initiatives, the Workplace for Business Strategy Execution system calculates actual values using associated and contributing objectives and initiatives.

Rollup

Aggregating information is also referred to as rollup. There are two types of rollup: batch and real-time.

Tip: Objectives roll up to objectives. Initiatives roll up to initiatives.

Use Table 7-6 on page 139 to compare them.

Table 7-6 Comparing batch versus real-time rollup (aggregation)

| Type of rollup | Guidelines | Other information |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Batch | <ul style="list-style-type: none"> ▶ The administrator must schedule this as a separately scheduled task. ▶ The run time is specified. ▶ The task could take a lot of time. ▶ All objectives/initiatives are read and written to during batch rollup. | It is best to schedule this task when the system is not so busy, during off-shift hours. |
| Real-time | <ul style="list-style-type: none"> ▶ The administrator can disable or enable this through a system setting. ▶ The real-time run happens whenever an actual value is changed from the user interface. ▶ Calculation is only done for a single branch of objective(s). | <ul style="list-style-type: none"> ▶ Before enabling this, evaluate your system performance to determine the impact. ▶ It may be best to use batch instead of real-time. |

Tip: If the rollup fails as shown in the log, and if logs do not indicate a serious database error, you may rerun the failed rollup.

Behind the scenes: data stores used in aggregation

There are a number of tables, as shown in Figure 7-4, that are used during aggregation.

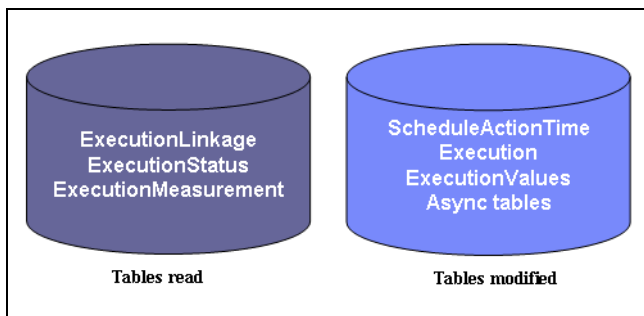


Figure 7-4 Example: Tables used in the aggregation process

Important: The administrator must provide users with the authority to push objectives and initiatives to others.

Linkage options

Although this is covered in 5.2.4, “Establishing linkages” on page 79, it is important to understand that there are two types of linkages, *push*, and *link to existing*. The reason for this is that users may need to use the data source(s) you create and provide to them.

- ▶ Push creates a new objective or initiative for another user and assigns accountability of the new objective or initiative to you.
- ▶ Link to existing assigns accountability of an existing objective or initiative for another user to an objective or initiative you own.

Attention: Only objectives and initiatives that aggregate from alignment can be pushed

7.2.2 Administrator tasks concerning data sources and initiatives

As an administrator, you will need to create data sources to be used in support of initiatives and objectives. Thereafter, you must provide the correct values so that they can be used by managers and others so designated as objective or initiative creators.

Types of aggregation calculations

There are five types of aggregation calculations, as described in Table 7-7.

Important: Regardless of the type of aggregation calculation, the result is always assigned as the valued of the target objective or initiative.

Table 7-7 Aggregation calculations

| If the aggregation calculation type is | During aggregation, this occurs |
|----------------------------------------|---------------------------------------------------------------------------|
| Additive | Values of all linked objectives and initiatives are added together. |
| Average | Values of all linked objectives and initiatives are averaged together. |
| Weighted | Each linked objective or initiative is multiplied by its weighing factor. |
| Maximum | The maximum value of all linked objectives or initiatives is found. |
| Minimum | The minimum value of all linked objectives or initiatives is found. |

7.2.3 ITSO Insurance: aggregating from alignment

In this scenario, Dennis Michaels, the CEO, has decided to restructure the management compensation program, as it has been several years since the program has been updated. Dennis decides that this should be an initiative for the present year, and that he would like to delegate this objective to several people on his team.

Here is the process Dennis followed

Phase 1: Dennis has a person who manages his scorecard for him, known as his Scorecard Administrator. This person created an objective titled *Restructure Management Compensation Programs* on Dennis’ scorecard. Next, he went the Properties of the scorecard.

On the Data Sources tab, he chose **Aggregate from alignment**, since his intention is to *push* the objective to his team.

Phase 2: Dennis pushes the objective to three others, creating five linkages. He names them more specifically with each linkage and even gives different targets (see Figure 7-5).

Properties for Restructure Management Compensation Program

Basic Settings

Targets

Data Source

Linkages

Web Resource

History

You can push your objective to others or link your objective to another person's existing objective. To push your objective to another person, click **Push Objective**. To link your objective to another objective, click **Link to Existing Objective**. If you push an objective to others, a new objective is created for them with your suggested targets. The new objective is aligned with this objective. If you link to an existing objective, your objective assumes the characteristics of the linked objective, and you need to specify the objective as a linkage type of alignment or dependency.

Push Objective

Link to Existing Objective

| Objective | Owner | Linkage Type | Target |
|---------------------------------------------|------------------|--------------|--------|
| Maintain competitive compensation | Elizabeth Skyler | Alignment | 100% |
| Validate workplace diversity | Elizabeth Skyler | Alignment | 85% |
| World Class Employer | Ronnie Espinosa | Alignment | 100% |
| Restructure Management Compensation Program | Rebecca Rich | Alignment | 100% |
| New Patents | Ronnie Espinosa | Dependency | NA |

Page 1 of 1

Total: 5 Displayed: 5

Aggregation type: Minimum

OK

Cancel

Figure 7-5 Several employees sharing one objective

Phase 3: Dennis is now able to view the status map showing progress on the objective (see Figure 7-6).

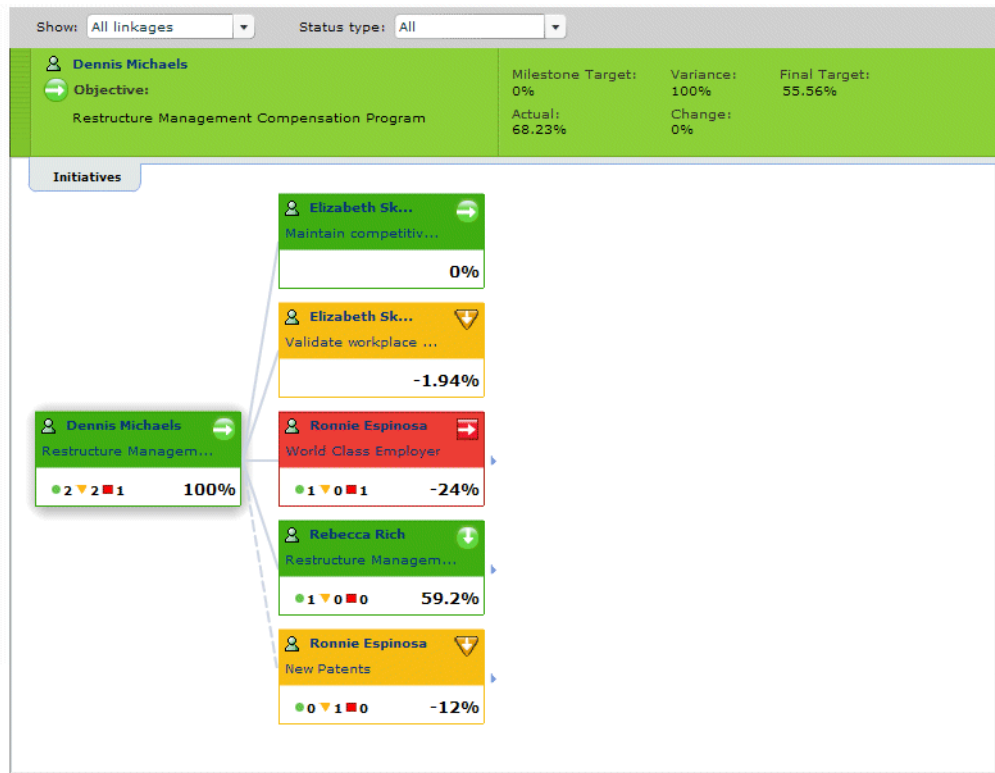


Figure 7-6 The status map showing delegation of an objective

7.3 Data acquisition using spreadsheets

Microsoft Excel spreadsheets can be used as a data source if proper guidelines are followed. Administrators can import from spreadsheets. Users can also import if they are granted access. For more on access, see 8.3, “Access policies and user access policies” on page 159.

Restriction: When information is imported from spreadsheets, the values will not roll up for a manual rollup. The values will rollup if real-time rollup is enabled. This is a known issue for the current release.

Guidelines

Spreadsheet data can be used for these items.

Important: To minimize data import problems, we recommend creating a *new* spreadsheet and formatting appropriately. You can also add an additional worksheet on top of an existing workbook and import that file. Only the data on the first worksheet will be imported.

Table 7-8 Creating a spreadsheet to be used for import

| If the spreadsheet data will be used for: | Then the following guidelines apply: |
|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scorecards. For more on scorecards, see Chapter 4, “Scorecard” on page 43. | Create a one-page, three-column spreadsheet with this information: <ul style="list-style-type: none"> ▶ Column A: Actual Values ▶ Column B: Objective and initiative names ▶ Column C: Date and time of the actual value (optional) |
| Objectives or initiatives | Create a one-page, two-column spreadsheet with this information: <ul style="list-style-type: none"> ▶ Column A: Actual Values ▶ Column B: Date and time of the actual value (optional) |

Attention: For user-specific information about setting up the spreadsheet data, consult the IBM Information Center help online and select **Users Guide** → **Working with the Scorecard** → **Importing actual values from an Excel spreadsheet** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

7.3.1 ITSO Science Museum: importing values

ITSO Science Museum wants to integrate some existing information into Workplace for Business Strategy Execution. The Science Museum has an objective to *Raise the number of new memberships*. They keep track of new memberships in a spreadsheet.

Information is stored in a spreadsheet

In this scenario, the data is stored in a spreadsheet, and there are only five values, so it is fairly easy to import the data directly into Workplace for Business Strategy Execution into a new objective.

Why import the data at all?

Although this information is being tracked in a spreadsheet, it is not widely accessible to all those who need to view and use the data. Having it integrated into Workplace for Business Strategy Execution allows for presentation on Status Maps and helps present the information to others in a graphical format. It also allows some forward-looking planning.

Step 1: A new objective was created to *Raise the number of new memberships*.

Step 2: The administrator created and properly formatted an Excel spreadsheet (see Figure 7-7 on page 144). He used an existing data set and copied the information by hand. Note that an end user can also do this step.

Tip: If you have a larger data set, you may find it easier to just clean up the data to coincide with formatting requirements.

The Excel spreadsheet

Note that only the data should display in the second column. For example, when you highlight the date and time cell, the date and time appears in the formula bar.

| | C10 | | f _x |
|---|-----|------------------------|----------------|
| | A | B | C |
| 1 | 403 | 06/28/2005 12:00:00 PM | |
| 2 | 412 | 06/28/2005 01:00:00 PM | |
| 3 | 432 | 06/28/2005 02:00:00 PM | |
| 4 | 441 | 06/28/2005 03:00:00 PM | |
| 5 | 451 | 06/28/2005 04:00:00 PM | |
| 6 | | | |
| 7 | | | |
| 8 | | | |

Figure 7-7 Excel spreadsheet showing two columns, properly formatted

Step 3: Within Workplace for Business Strategy Execution, the user imported the spreadsheet (see Figure 7-8).

IBM Workplace Services Express

My Work

Import for Dennis Michaels

To import actual values from a Microsoft Excel spreadsheet, click **Browse** to select the file.

* File name:

\\.\host\Shared Folders\residency on my host\import2.xls ⓘ

* Required field

Figure 7-8 Importing a file: browse to the file system and select

Step 4: After pressing the **OK** button, the window returned back to the desktop, and a message displayed that import was complete (see Figure 7-9 on page 145).

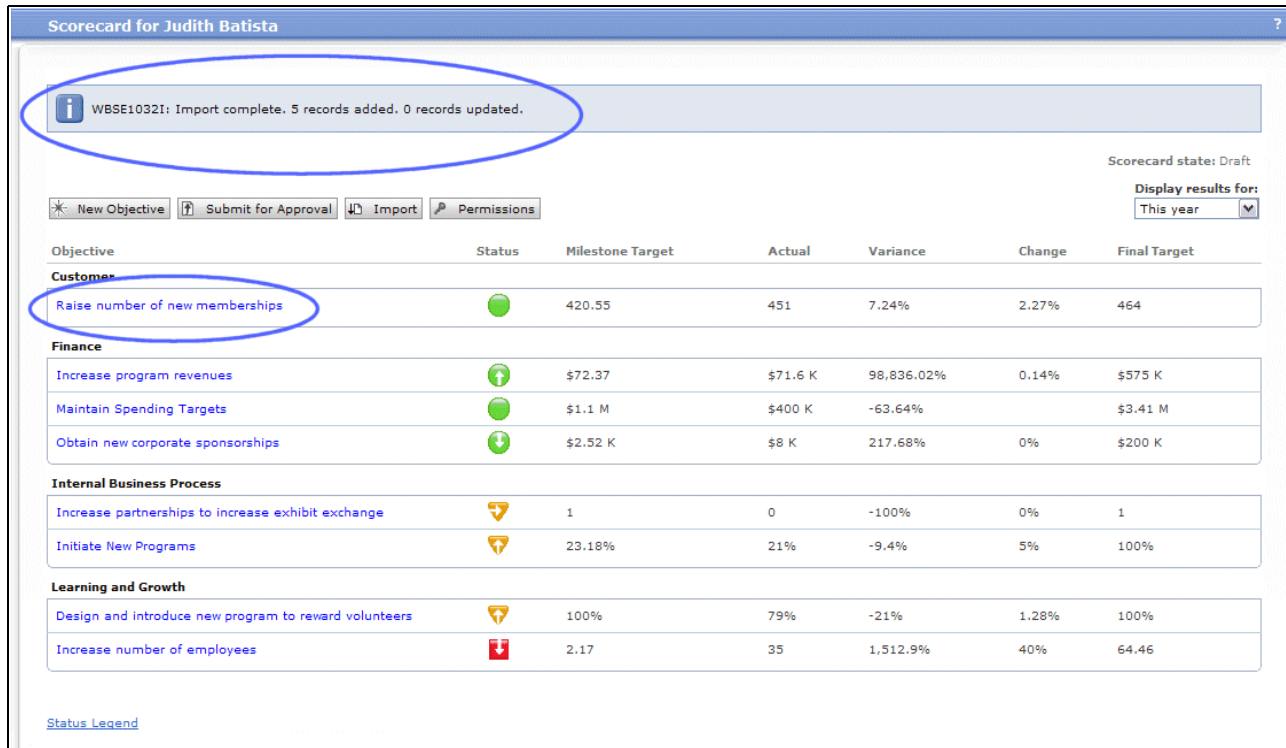


Figure 7-9 After importing from a spreadsheet

Step 5: The user is able to highlight the objective, and view the data points (see Figure 7-10).

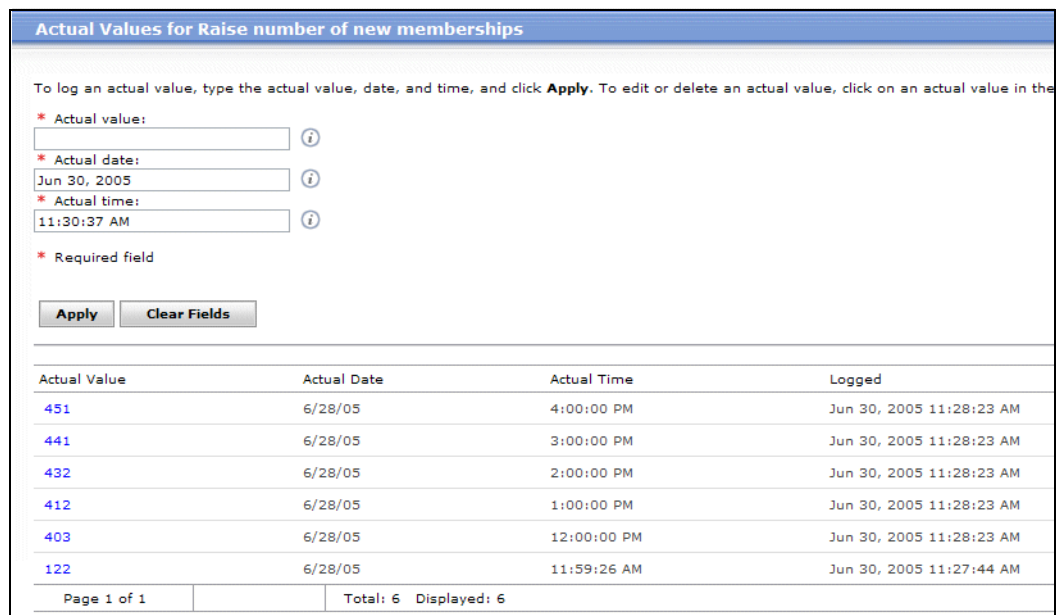


Figure 7-10 Post-import. Values from the Excel spreadsheet



Workplace for Business Strategy Execution system administration

This chapter provides guidance for the Workplace for Business Strategy Execution administrator. The focus is on setup and configuration with additional emphasis on commonly used administrative features within the product.

Whether your company is large, such as the ITSO Insurance Company, or smaller, such as the ITSO Science Museum, this chapter will help you configure and use the Workplace for Business Strategy Execution system.

This chapter augments the product documentation found in the IBM Information Center online. The topics are as follows:

- ▶ Administering the Workplace for Business Strategy Execution environment
- ▶ Understanding product settings
- ▶ Access policies and User Access Policies
- ▶ Monitoring Workplace for Business Strategy Execution
- ▶ Log and trace overview
- ▶ Navigation, views, and custom hierarchies
- ▶ Alerts and Events
- ▶ Lightweight Directory Access Protocol (LDAP)
- ▶ Application development overview

Attention: The screen captures and scenarios discussed in this chapter were created using Workplace for Business Strategy Execution Version 1.0 Team Edition. This chapter can also be used to learn the administrative tools in Workplace for Business Strategy Execution Version 1.0 Enterprise Edition

8.1 Administering the Workplace for Business Strategy Execution environment

Workplace for Business Strategy Execution administrator tasks influence the entire environment. These tasks include a range of things commonly done for other application software products. We can classify tasks in three categories: daily, periodic, and single-use.

Daily tasks

General operational day-to-day tasks and interactions.

Periodic tasks

Things that the administrator needs to do *once in a while* instead of daily.

Single use tasks or events

These are items that the administrator generally does only once. Of course, if system-wide changes need to occur, then the task may also change (need to be done again or differently). Also, single-use tasks generally are done at the initial installation and configuration stages of the product.

8.1.1 Determining the need for administrator attention

Managing a new enterprise environment can be challenging. The good news is that on a daily basis, Workplace for Business Strategy Execution needs minimal attention.

Generally, most of the system administrative work is done at the beginning of system installation and implementation. The system administrators workload should decrease thereafter, and daily tasks are minimal, concerned mostly with system operation, monitoring, and user assistance.

Management planning

Planning for Workplace for Business Strategy Execution administration involves learning what tasks are involved. Use Table 8-1 to help understand some of the tasks involved with managing the Workplace for Business Strategy Execution environment. Some of the *single-use* tasks may need to be revisited again periodically.

Tip: Use Table 8-1 on page 148 as a guideline. Your actual use may vary with respect to implementation.

Table 8-1 Administrative tasks and interaction with the Workplace for Business Strategy Execution environment

| Daily tasks | Periodic tasks | Single use tasks |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------------------|
| Monitor logs. | Run the scheduler for roll-up to occur. | System installation |
| Respond to users for things they may need such as adding new users. Note that adding new users requires LDAP. | Enabling a portlet to work with Workplace for Business Strategy Execution (optional). | Product settings |
| Start/stop server (as necessary, depending upon other tasks). | Setting up data sources. | Building a hierarchy |

| Daily tasks | Periodic tasks | Single use tasks |
|-----------------------------------------|---------------------------------------------------------------|-----------------------------------------------|
| Provide information to users as needed. | Graphs and reporting. | Setting up any custom unique names (optional) |
| | Event creation or management. | Configuring LDAP |
| | Access policy configuration/setup or changes. | Installing or uninstalling the sample data |
| | Start/stop server (as necessary, depending upon other tasks). | Aggregation mode setup (or change) |
| | | Access policy configuration/setup or changes |

8.1.2 Administrative help

There are several resources to help the Workplace for Business Strategy Execution system administrator for easier system operation and implementation. Some of these are listed in Table 8-2.

Table 8-2 System administration: helpful resources

| Resource | Useful for | How to access or obtain |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The IBM Information Center - online for Workplace for Business Strategy Execution. | Release-specific system documentation. Includes links to other needed resources. | http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp |
| Workplace for Business Strategy Execution context-level help system. | Provides task and context help at various levels within Workplace for Business Strategy Execution. Users can also access this system. | Within Workplace for Business Strategy Execution, this is denoted by an icon (letter “i” with a circle) beside the item. |
| IBM Workplace online documentation. | Online links to all IBM Workplace products. Navigate also to product forums and other resources | http://www-128.ibm.com/developerworks/workplace/documentation/ |
| Information on creating balanced scorecards. For more on scorecards, see 4.1, “Using Workplace for Business Strategy Execution to align your strategy” on page 44. | Text (see <i>Balanced Scorecard Step-by-Step</i> by Niven et al) | http://www.amazon.com/gp/product/0471078727/qid=1143477199/sr=1-1/ref=sr_1_1/104-8285349-7103907?s=books&v=g1ance&n=283155 |

8.1.3 Scenario 1: ITSO Insurance Company - Planning for Workplace for Business Strategy Execution administration, no sample data or LDAP

The ITSO Insurance Company system administrator is charged with installing and setting up Workplace for Business Strategy Execution for use in corporate strategic planning. The administrator needs to do some preliminary planning. She decides to review the documentation and then formulate an implementation plan.

Goals

Workplace for Business Strategy Execution Version 1.0 ships with a set of sample data. ITSO Insurance does not plan to use the sample data, and they initially do not go through the LDAP integration. Later on, LDAP will be configured and Workplace for Business Strategy Execution will use the corporate LDAP.

Plan flowchart

The administrator put together the plan displayed in Figure 8-1.

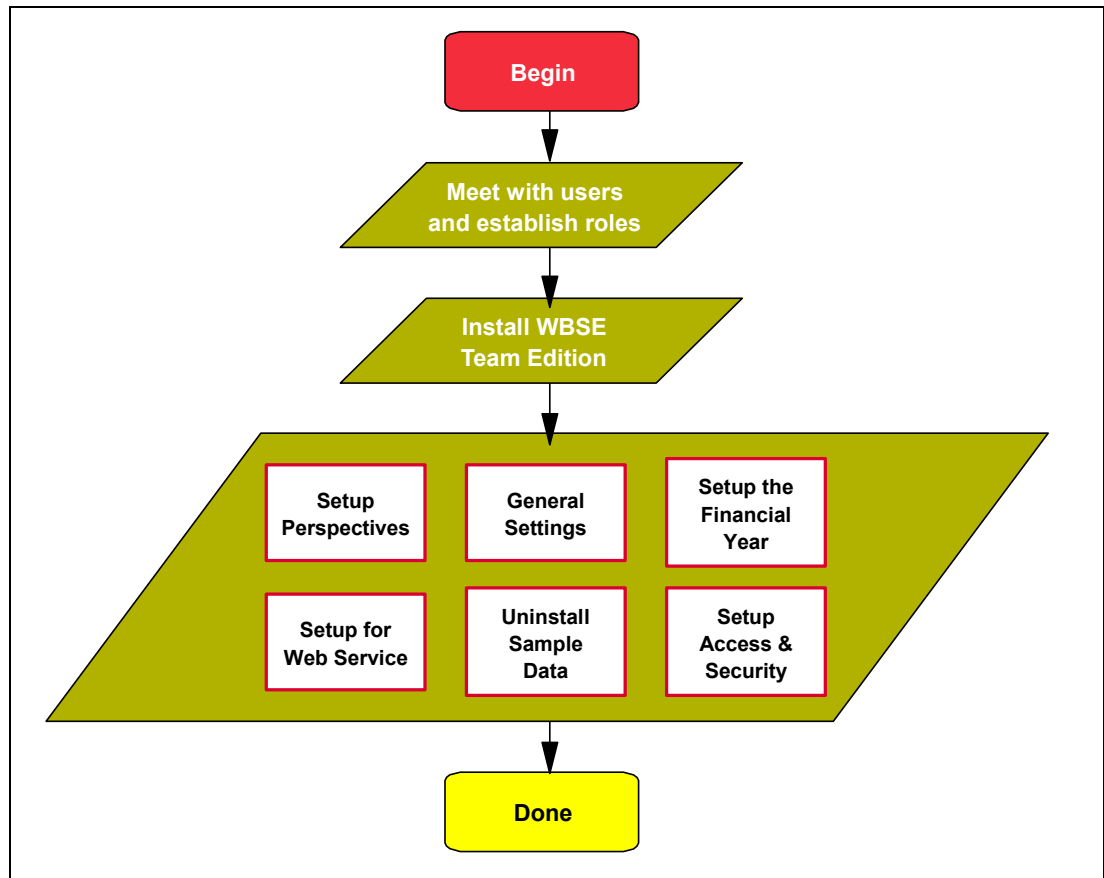


Figure 8-1 Scenario 1- process diagram for administrator - implementing Workplace for Business Strategy Execution with no sample data or LDAP

Important: The above scenario is for Workplace for Business Strategy Execution on the Team Edition, not the WebSphere Portal based Enterprise Edition. For more information about installation, go to the IBM Information Center and select **Getting Started** → **Installing with IBM Workplace Services Express Version 2.5** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

8.1.4 Scenario 2: ITSO Science Museum - Planning for Workplace for Business Strategy Execution administration, using the sample data supplied and integrating with LDAP once in production mode

The ITSO Science Museum system administrator is charged with installing and setting up Workplace for Business Strategy Execution for use in strategic planning. The administrator needs to do some preliminary planning. She decides to review the documentation and then formulate an implementation plan.

Goal

The administrator sees value in using the sample data supplied with Workplace for Business Strategy Execution. For the initial deployment, they will use the sample data with the users supplied, then remove the data and integrate with an existing LDAP.

LDAP

LDAP requires some planning all on its own. There are several types of LDAP products that can be used with Workplace for Business Strategy Execution. Each one has its own particular settings that are not covered in this redbook. An assumption is that your LDAP is already online and functioning correctly. LDAP is covered in more detail in, 8.8.6, “Scenario 2 - ITSO Science Museum - Install Workplace for Business Strategy Execution and then configure for an existing LDAP” on page 185.

Attention: LDAP is covered in greater detail in the IBM Information Center online. Select **Getting Started** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

Cloudscape

A Cloudscape™ database is used with Team Edition of the product. There are certain settings that the administrator needs to do for Cloudscape after integration with LDAP. The plan must include these settings. See 8.8, “Lightweight Directory Access Protocol (LDAP)” on page 179.

The plan

For this scenario, the sample data supplied with Workplace for Business Strategy Execution will be used for testing purposes by the Workplace for Business Strategy Execution users and the administrator. Since the sample data is installed automatically with Workplace for Business Strategy Execution, there is no need to install, unless IBM creates a new sample data set for your version of Workplace for Business Strategy Execution for a later year.

Figure 8-2 gives an overview of Scenario 2.

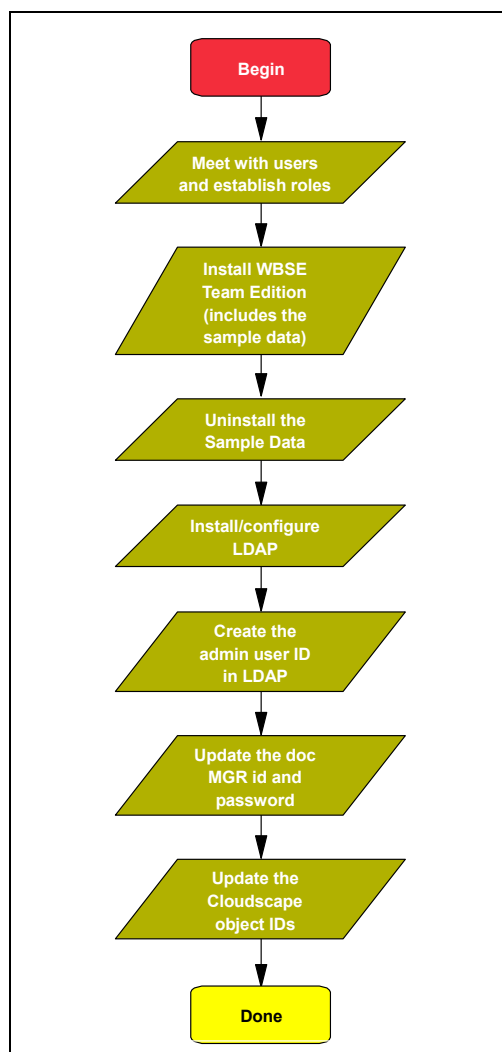


Figure 8-2 Scenario 2: Overview of administrator plan for Workplace for Business Strategy Execution implementation using the sample data, then going into production using the corporate LDAP

8.2 Understanding product settings

The Workplace for Business Strategy Execution Product Settings user interface allows administration of system variables. These variables are used to default to and set certain characteristics for Workplace for Business Strategy Execution. Table 8-3 describes the settings.

Table 8-3 Workplace for Business Strategy Execution Product Settings

| Product setting | This setting allows the administrator to |
|-----------------|------------------------------------------------------------------------------------------------|
| Perspective | View, edit, create, or delete a perspective. |
| General | Set trend calculation default values, such as number of values to be used and variance factor. |

| Product setting | This setting allows the administrator to |
|-----------------|-------------------------------------------------------------------|
| Financial Year | Set the starting month and day for each financial year calendar. |
| Web Services | Post links to needed information for Web services implementation. |
| Sample Data | Install, reinstall, or remove the supplied sample data. |

8.2.1 Working with product settings

Only the administrator has access to the product settings.

Signing in

Sign into Workplace for Business Strategy Execution with your Administrator ID and password. Then select **Business Strategy Execution** → **Administration** → **Business Strategy Execution** → **Product Settings**, as shown in Figure 8-3.

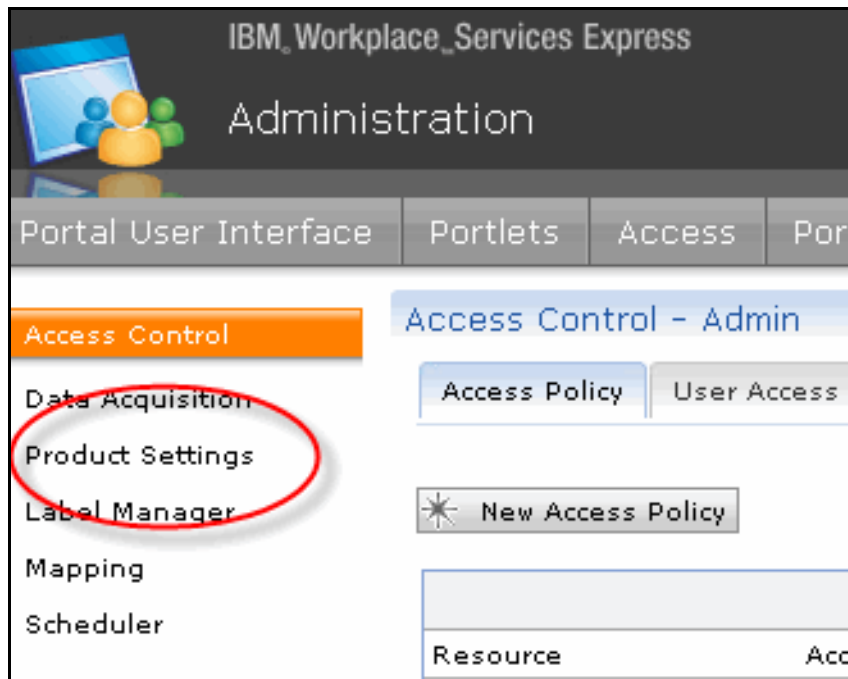


Figure 8-3 Accessing product settings

Tip: There are other administrative settings within Workplace for Business Strategy Execution (see Figure 8-4). These would be for IBM Workplace Services Express. Access settings for Workplace Services Express by choosing **Administration** directly after the initial sign-on menu.

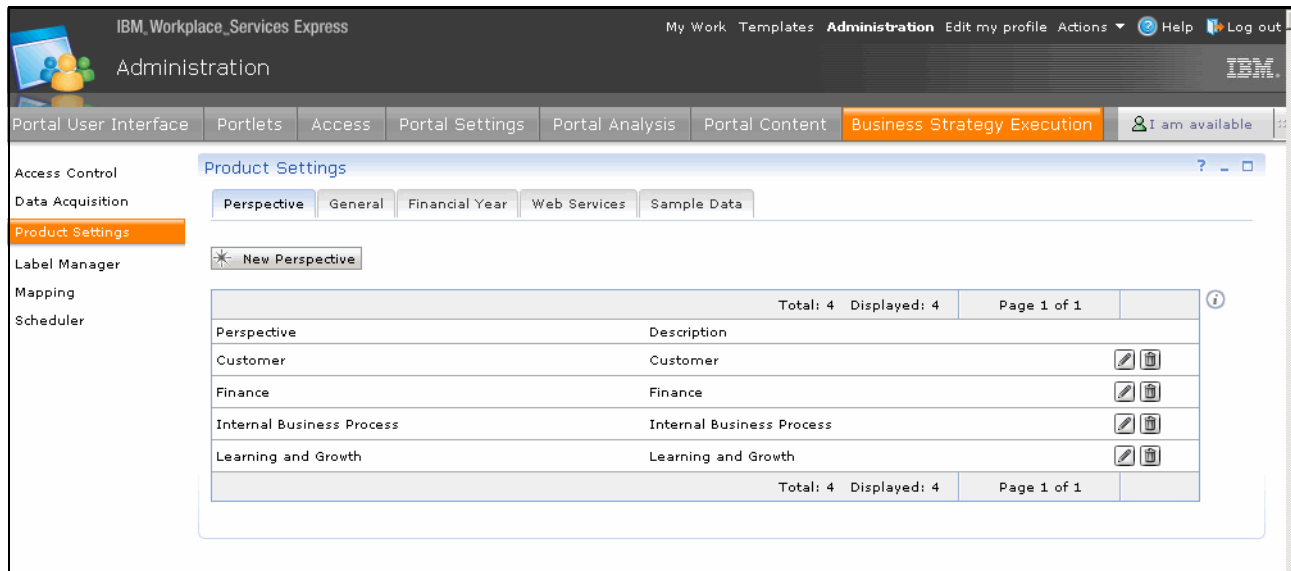


Figure 8-4 Product settings: showing tabbed sections with administrative features

Perspectives settings

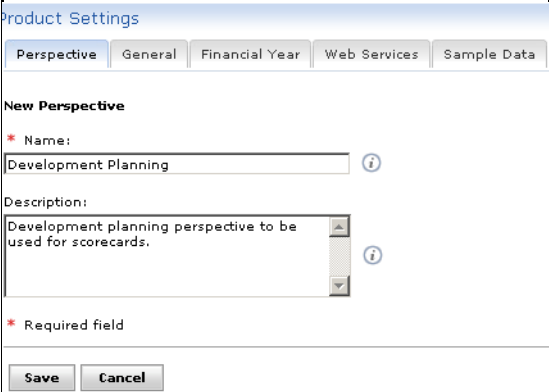
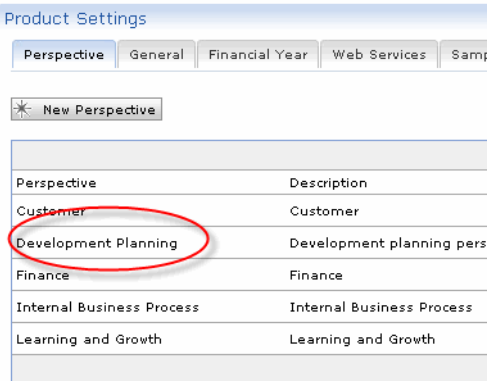
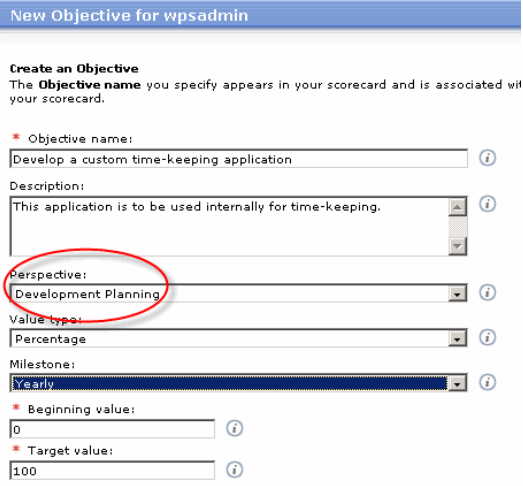
The Perspectives tab allows you to view, edit, create, or delete perspectives. Behind the scenes, all perspective information is stored in the WBPM.PERSPECTIVE database table.

Perspectives are used in scorecards, and associated with objectives and initiatives.

Restriction: There is a length limitation on the input fields. A perspective name length should not exceed 256 bytes, and its description should not exceed 1024 bytes.

Table 8-4 on page 155 shows how you create a perspective through product settings.

Table 8-4 Creating a perspective through product settings

| Steps | Result or further described | | | | | | | | | | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|----------|----------|----------------------|---------------------------|---------|---------|---------------------------|---------------------------|---------------------|---------------------|
| Choose the New Perspective button and fill in the required information. |  <p>Product Settings</p> <p>Perspective General Financial Year Web Services Sample Data</p> <p>New Perspective</p> <p>* Name: Development Planning</p> <p>Description: Development planning perspective to be used for scorecards.</p> <p>* Required field</p> <p>Save Cancel</p> | | | | | | | | | | | | |
| Choose Save to save the perspective. |  <p>Product Settings</p> <p>Perspective General Financial Year Web Services Sam</p> <p>* New Perspective</p> <table border="1"> <thead> <tr> <th>Perspective</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Customer</td><td>Customer</td></tr> <tr> <td>Development Planning</td><td>Development planning pers</td></tr> <tr> <td>Finance</td><td>Finance</td></tr> <tr> <td>Internal Business Process</td><td>Internal Business Process</td></tr> <tr> <td>Learning and Growth</td><td>Learning and Growth</td></tr> </tbody> </table> | Perspective | Description | Customer | Customer | Development Planning | Development planning pers | Finance | Finance | Internal Business Process | Internal Business Process | Learning and Growth | Learning and Growth |
| Perspective | Description | | | | | | | | | | | | |
| Customer | Customer | | | | | | | | | | | | |
| Development Planning | Development planning pers | | | | | | | | | | | | |
| Finance | Finance | | | | | | | | | | | | |
| Internal Business Process | Internal Business Process | | | | | | | | | | | | |
| Learning and Growth | Learning and Growth | | | | | | | | | | | | |
| Now you may use the perspective in a scorecard. We created an objective and used this newly-created perspective titled Development Planning. |  <p>New Objective for wpsadmin</p> <p>Create an Objective The Objective name you specify appears in your scorecard and is associated with your scorecard.</p> <p>* Objective name: Develop a custom time-keeping application</p> <p>Description: This application is to be used internally for time-keeping.</p> <p>Perspective: Development Planning</p> <p>Value type: Percentage</p> <p>Milestone: Yearly</p> <p>* Beginning value: 0</p> <p>* Target value: 100</p> | | | | | | | | | | | | |

Attention: Although you may delete perspectives, you would first have to delete all associations with objectives or initiatives! This will affect system data, so careful planning is warranted in planning and managing perspectives. You may also have to do a roll-up depending upon types of objectives and initiatives.

The General settings tab

General settings allows you to update a number of system values concerned mostly with trending, aggregation, calculation, query, and currency, as shown in Table 8-5. Use it to help identify what they affect in the system.

Table 8-5 General settings

| General tab setting | Used for | Example or further described |
|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Number of values to be used in the Trend calculation. | This is the number of values that will be used in calculating trends. | <ul style="list-style-type: none"> ▶ The system default value is 4. ▶ Changing to a higher value will impact performance. |
| Variance factor. | This variance factor is also used in trend calculation. This is the percentage of standard deviation of the last trend value. | <ul style="list-style-type: none"> ▶ The system default is 10, which means 10%. ▶ Changing to a higher value will impact performance. |
| Enable Aggregation Calculation check box. For more on aggregating from alignment, see “Aggregate from alignment” on page 78. | This is used to allow or disallow real-time aggregation. Select Enable to aggregate actual values. Clear the check box to aggregate actual values with the scheduler only. | Recommendation is to disable this. (See the Attention box below). |
| Currency type. | This setting specifies the currency type used in monetary calculations. | <ul style="list-style-type: none"> ▶ This does NOT do currency conversion! ▶ For example, if a target of \$50 US Dollars changes to EUROS, it is now 50 EUROS. |
| Maximum query results returned. | When the system executes queries, this is the maximum number of query results. | <ul style="list-style-type: none"> ▶ The default value is 500. ▶ If all results are desired, set to zero (0). ▶ This affects ALL system queries. ▶ The server must be restarted for changes to take effect. |

Attention: If real-time aggregation is used in conjunction with an actual value (entered or updated), then all actual values in the system are aggregated at that time.

Tip: The data pertaining to General settings is saved in the WBPM.GLOBALSETTING database table.

Financial Year tab

The purpose of this tab is for the administrator to define a starting month and day for each financial year quarter (see Table 8-5 on page 156).

All financial year information is saved in the WBPM.GLOBALSETTING database table.

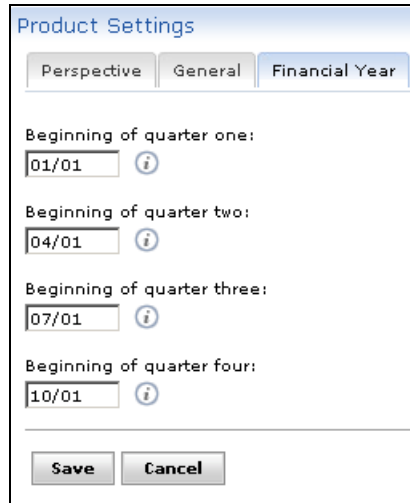


Figure 8-5 Financial Year settings

Web Services tab

Workplace for Business Strategy Execution allows Web services to be used by defined data sources. For more on data sources and Web services, see Chapter 7, “Data sources” on page 127.

There are five control settings for Web services. Table 8-6 shows the various settings with descriptions.

Table 8-6 Web Services administrative settings

| Web Services setting | Further described |
|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Data acquisition Web Service WSDL. | This is a Web address link to the data acquisition Web service endpoint. |
| Web services proxy package. | Here are the Java classes used for developing a Web service client application. |
| Web services enablement plug-in JAR files. | The JAR files used for enabling a Workplace for Business Strategy Execution portlet. |
| Web services enablement plug-in JSP™ files. | The JSP files used for enabling a Workplace for Business Strategy Execution portlet. |
| Sample dashboard portlet with source code. For more on dashboards, see Chapter 6, “Dashboard” on page 103. | This is a Sample Dashboard portlet with source code. |

Figure 8-6 shows the Web services default settings for the Workplace for Business Strategy Execution system.

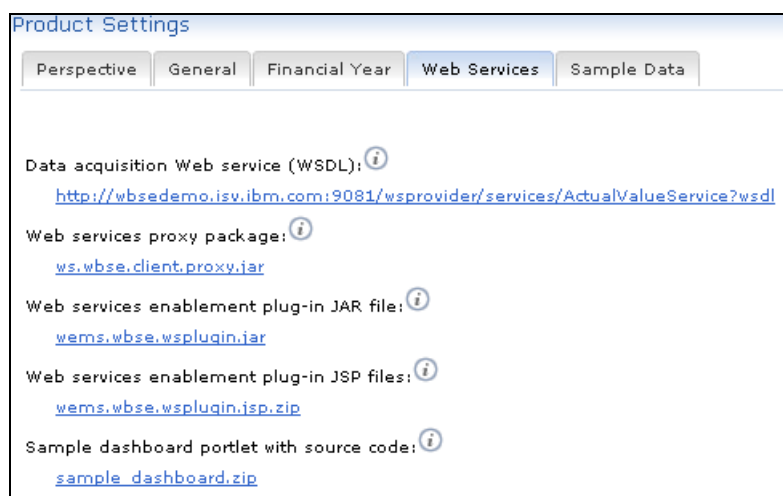


Figure 8-6 Web Services tab: default settings

Sample data

The Workplace for Business Strategy Execution system is supplied with optional sample data that can help you practice using the system prior to putting into production. This sample data is easily installed and uninstalled through the Sample Data tab, as shown in Figure 8-7 on page 159.

Purpose of sample data

The sample data is supplied for companies that are interested in trying out the product prior to putting it into production. We suggest trying out these features.

- ▶ Adding objectives and initiatives to the scorecard.
- ▶ Pushing down objectives.
- ▶ Recording values or changing target values.
- ▶ Demonstrate navigational and scorecard functionality.

Restriction: Sample data limitations exist. There is no way of adding or deleting individual users in the sample data organization. Reinstallation adds back all the original cast. During removal and reinstallation (if done), audit records are generated for items deleted or installed, which produces approximately 1500 records in the WBPM.audittrail.

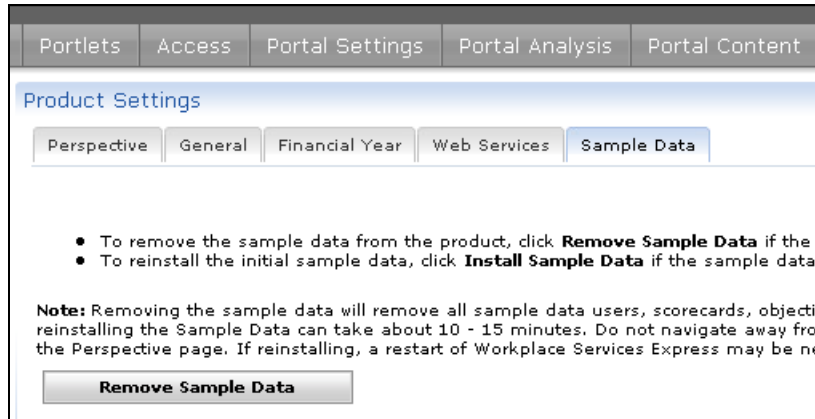


Figure 8-7 The Workplace for Business Strategy Execution sample data installation/removal window

Removing sample data

Sample data is removed via the Product Settings portlet. The portlet detects if the Sample Data is installed. The system administrator should have exclusive use of the server during this operation.

Removal is done in three steps

- Values and links are removed.
- Execution records, scorecards, and principals are removed.
- User names are removed from WebSphere Member Manager (WMM).

After removal

Removal takes about 10-15 minutes. Diagnostics are found in the SystemOut.log. Reinstallation restores the original Sample Data information. Upon completion, the Perspective Tab is shown.

Important: We recommend restarting Workplace for Business Strategy Execution after removal.

8.3 Access policies and user access policies

This section discusses access and the two types of access policies. Access policies define control for resources. Administrators as well as users can create access policies. One example where a user may be granted access is for managers who need to be able to create objectives.

Types of policies

There are two types of policies: access policy and user access policy.

8.3.1 Managing access policies

To manage Workplace for Business Strategy Execution access control settings, select **Business Strategy Execution** → **Administration** → **Business Strategy Execution** → **Access Control** → **Admin**. Figure 8-8 shows the window that appears.

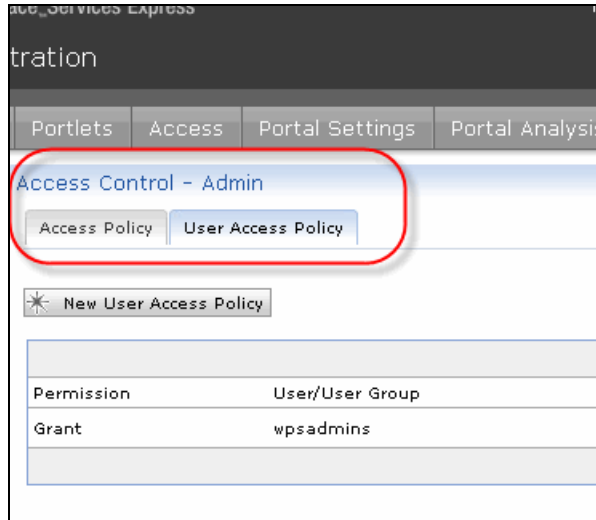


Figure 8-8 Accessing controls for access policies and user access policies

Access to Workplace for Business Strategy Execution resources is controlled within the product through *policies*. For more information about how access affects permissions, see 5.5, “Setting permissions” on page 87.

Relationship of policies to resources

Policies control user access to resources. The only way to grant or revoke permissions is by way of policies. You cannot grant someone a specific *action*, such as view, edit, and so on. Use Table 8-7 to cross-reference desired actions by user roles.

Attention: Access rights are not the same for the scorecard, initiatives, and objectives.

For example, the Approver role has View, Return, and Approve access for the scorecard, but only has View access for objectives and initiatives.

The Workplace for Business Strategy Execution Information Center has detailed information including lists of roles associated with actions. Refer to the Information Center online and select **Users Guide** → **Working with the Scorecard** → **Configuring Access Control Permissions** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

Table 8-7 Examples of choosing roles according to desired result

| If your goal is: | Then you may consider: |
|------------------------------------------------------------|------------------------------------------------------------------------|
| Allow a user to specify another user with delegate access. | Modifying the scorecard resource. |
| Allow a user or group to access a resource. | You can allow this for the scorecard, initiative, or objective levels. |

| If your goal is: | Then you may consider: |
|--------------------------------------------------------------------|------------------------------------------------------------------------|
| Allow a user to edit resources in a given scorecard. | You can allow this for the scorecard, initiative, or objective levels. |
| Allow a person to push an objective or initiative to another user. | You would consider using the scorecard resource. |

8.3.2 Policy components

In brief, a policy contains the four components shown in Table 8-8.

Table 8-8 Policy components

| Component | Further described |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The resource type or resource instance | <ul style="list-style-type: none"> ▶ There are different categories of resources. ▶ Examples: Page, User, Portlet, Product Settings, Mappings, Data Source Definition, Scorecard, Objective, and Initiative are a few examples. ▶ Resources can be stand-alone or have a child-parent hierarchical structure. |
| Actions | <ul style="list-style-type: none"> ▶ Actions are what is allowable against a Workplace for Business Strategy Execution resource. ▶ Examples of actions: View, Edit, Add, Child, Create, Delete, Push, Submit, Delegate, Return and Approve, Grant, and Revoke. |
| Roles | <ul style="list-style-type: none"> ▶ A noun (label) that is comprised of a group of actions. ▶ Only Roles can be used to grant or revoke permissions. |
| Subject | For example, this could be a portal user or a portal user group |

8.3.3 Changing or creating access policies

The Workplace for Business Strategy Execution Administrator can create, edit, delete, or maintain access policies through the Access Policy tab. Use Table 8-9 as a guide to making changes.

Important: If the site is configured to use an LDAP directory, the user access control policies for IBM Workplace for Business Strategy Execution are dependent on how user information and attributes are set up in the LDAP directory.

Table 8-9 Sample of making changes in access policy

| If the administrator needs to: | Then do the following: |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------|
| Create a new access policy. | Select the New Access Policy button to create a new policy. You will need to specify the settings. |
| Change an existing access policy. | Choose the Edit icon to modify an existing access policy. |
| Delete an access policy. | Choose the Delete icon to delete an access policy. |

Understanding the settings

Access policies may already exist in your system due to installation of the sample data or through testing. Table 8-10 describes the items, provides examples, and helps clarify details on this panel.

Table 8-10 The access policy panel

| Item | Used for | Further described |
|-------------|---------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Resource | The applicable resource. | The resource could be a scorecard, objective, or initiative. |
| Access | This is the role (think of this as a group of actions) that we want to apply the policy to, for the resource. | You must know what actions are assigned to a role in order to properly assign access! |
| Start level | Numeric representation of the level above a resource where actions can occur. | The level is relative to the corporate hierarchy. One level above an individual is their manager (level 1). One level below is their subordinate (level -1). |
| End level | Numeric representation of the ending level that the action (associated with the role) can no longer occur. | If this is level 1, then no actions can occur after this level. |

Figure 8-9 on page 163 shows an example of the access policy window. Indicated are several roles already defined for the scorecard resource.

Tip: To help clarify understanding of the start and end levels, think of the Access column as a group of actions.

Tip: Each access role has a list of actions that are allowable. The Start_level denotes how many levels above the resource that the action can happen:

- ▶ Manager Role (access) has view and push capability.
- ▶ Resource shown here is a scorecard.
- ▶ The Start Level is All levels above.
- ▶ The End Level is 1.

Interpretation: The scorecards (this resource) can be pushed or viewed (associated actions) to the Manager (role) from all levels above (starting level), but cannot be pushed beyond the manager (role), as the ending level is a 1!



| Access Control - Admin | | | |
|----------------------------------|----------|------------------|-----------|
| Access Policy User Access Policy | | | |
| * New Access Policy | | | |
| Total: 4 Displayed: 4 | | | |
| Resource | Access | Start Level | End Level |
| Scorecard | Viewer | 2 | -3 |
| Scorecard | Approver | 1 | 1 |
| Scorecard | Manager | All levels above | 1 |
| Scorecard | Owner | 0 | 0 |
| Total: 4 Displayed: 4 | | | |

Figure 8-9 Example User Access Policy controls, highlighting Manager role access

Important: Access policies propagate across the entire Workplace for Business Strategy Execution system.

8.3.4 User access policies

The second set of access controls is user access policies. Access policies can be set for the following items:

- ▶ Scorecards
- ▶ Objectives
- ▶ Initiatives

One default user access policy is provided (wpsadmins)

IBM Workplace for Business Strategy Execution provides a default user access policy. The access policy is described as follows:

- ▶ The Access Role is Administrator.
- ▶ It is an *inherited* policy.
- ▶ Users in this group have administrator access to all scorecards.
- ▶ The policy can be changed.
- ▶ New policies can be added.

How user access policies work

Permission can only be granted or revoked by using Roles, not by specific actions.

Here is a sample policy:

All WBSE Administrators (this is a user group) can perform all actions (the administrator role has all actions) on a scorecard (a scorecard is a resource type).

Resolving conflicting policies

Since resource policies can be inherited, there may be a case where conflicting policies exist. If this happens, the Workplace for Business Strategy Execution administrator may need to help resolve the conflict.

Here is an example:

A user is created. The user is granted manager access through the role of Manager. Normally this would allow her to View or Push an objective (resource). However, the resource (objective) has an explicit policy that will not permit push by anyone. In this case, the administrator would need to revoke the resource policy, thus allowing the Manager actions of View and Push for the user.

8.4 Monitoring Workplace for Business Strategy Execution

Workplace for Business Strategy Execution is a system comprised of several underlying components. Although there are different user levels possible in the system, this section is concerned with administrative monitoring.

Data versus operational monitoring

We classify administrative monitoring into two types: data (information monitoring) and operational monitoring. The Workplace for Business Strategy Execution administrator is concerned with operational monitoring, and others (likely the management team) are concerned with business-centric information, as shown in Table 8-11 on page 165.

Important: This is only a guideline, as your administrator may take a greater role in the business-information side of Workplace for Business Strategy Execution monitoring. Consult 8.3, “Access policies and user access policies” on page 159 for more information about access levels.

Table 8-11 Monitoring Workplace for Business Strategy Execution: by user and type

| If the Workplace for Business Strategy Execution user is: | They need to monitor | Use this method or feature |
|------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Workplace for Business Strategy Execution business user | Information such as scorecards, objectives, initiatives, trends, and so on. | They would use various methods depending upon the information they need, such as scorecards, My Alerts, Custom Views, or Targets. These are all covered in greater detail in the IBM Information Center at: http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp |
| A Workplace for Business Strategy Execution system administrator | Performance, ongoing system health, and general operations | <ul style="list-style-type: none"> ▶ The WebSphere Portal logs, such as SystemErr.log and SystemOut.log. ▶ Monitor the status of scheduled Workplace for Business Strategy Execution events (aggregation, event reporting, and so on). The success/failure information is available and could indicate the necessity for further information gathering. |

Tip: For more information about scorecards, My Alerts, Custom Views, or Targets, you may also wish to consult the IBM Information Center online and select **Users Guide** → **Working with the Sample Data** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

8.4.1 Data structures overview

The Workplace for Business Strategy Execution system comes complete with a built-in database, Cloudscape. Many system settings are stored in database tables. Table 8-12 provides examples. Use this to help understand what happens behind the scenes.

Important: In this Redpaper, we provide information for Workplace for Business Strategy Execution Team Edition. Although the Workplace for Business Strategy Execution Enterprise Edition may share some of the same data structure characteristics, the Enterprise Edition uses IBM DB2.

Table 8-12 Data structures classified by type of information

| Product feature or function | Type of information | Example, location, or further described |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Alert checker | Alert checking activity, such as execution value, status, management, and alerts | Execution table fields: LAST_ALERTED_STATUS, LAST_ALERTED_TREND LAST_ALERTED_MILESTON E |
| Label Manager | Used system-wide. Types of labels are configurable (modifiable) and non-configurable. | WBPM.LABEL table stores all configurable labels. wbpm_label.properties file(s) for each locale. The wbpm_label_description.properties file stores label descriptions. |
| LDAP | Each client will have a different hierarchy structure. | LDAP information will be managed with Websphere Member Manager (WMM). |
| Sample Workplace for Business Strategy Execution data | Sample users, hierarchy, associated objectives, and initiatives and scorecards. Installed into Cloudscape tables. All diagnostics are written to <wse_home>\PortalServer\Logs\SystemOut.log | For example: WBPM.Perspective WBPM.Principal WBPM.Scorecard WBPM.Execution WBPM.ExecutionLinkage WBPM.ExecutionMeasurement WBPM.ExecutionValue WBPM.ExecutionStatus |
| AsyncManager | Concerned with the task scheduler. For more information about how the scheduler task affects data, see 7.1.4, "Data acquisition technical details" on page 131. | Several tables, for example: WBCR.ASYNCTASK WBCR.ASYNCTASKLOG (and a few schemas) |

Tip: As an administrator, you may need to access Cloudscape data through a data utility. One example of this need is if you upgrade to LDAP. Workplace for Business Strategy Execution provides a program called CVIEW that can be used for this purpose. CVIEW is not part of Workplace for Business Strategy Execution, but can be used by administrators to view and update information in the system. An example of using the CView utility to update the object IDs in Cloudscape is in found in “Steps: Updating the object IDs in Cloudscape using CView” on page 181.

8.5 Log and trace overview

Workplace for Business Strategy Execution has certain logs that provide system administrators with important information. Normally, you should not need to trace system functions, and we do not recommend using tracing for everything. There are times when you may need to turn on tracing. A few examples:

- ▶ When troubleshooting an expected problem, in order to gather more comprehensive information than what is normally in the logs
- ▶ When IBM support needs diagnostic details to help pinpoint the problem during problem source identification
- ▶ If you suspect an area of the product is causing a problem and wish to isolate and learn more about what is happening behind the scenes.

System log files

Workplace for Business Strategy Execution runs on IBM WebSphere Portal. Therefore, you will need to become familiar with some of the WebSphere Portal logs used in the system. The system event logging facility of WebSphere Portal enables the recording of information about the operation of the portal. Event logs provide portal administrators with information about important or abnormal events, especially errors, that occur during the operation of the portal. In addition, event logs gather debugging information that helps portal support to resolve problems with the operation of the portal.

WebSphere Portal provides two types of logging: logging of messages, and logging of debugging messages called traces. The logs you will use most often are:

- ▶ SystemOut.log
- ▶ SystemErr.log

Example

Logs are viewable by many different utilities capable of reading text. Figure 8-10 is an example of viewing SystemErr.log using Windows® Notepad.

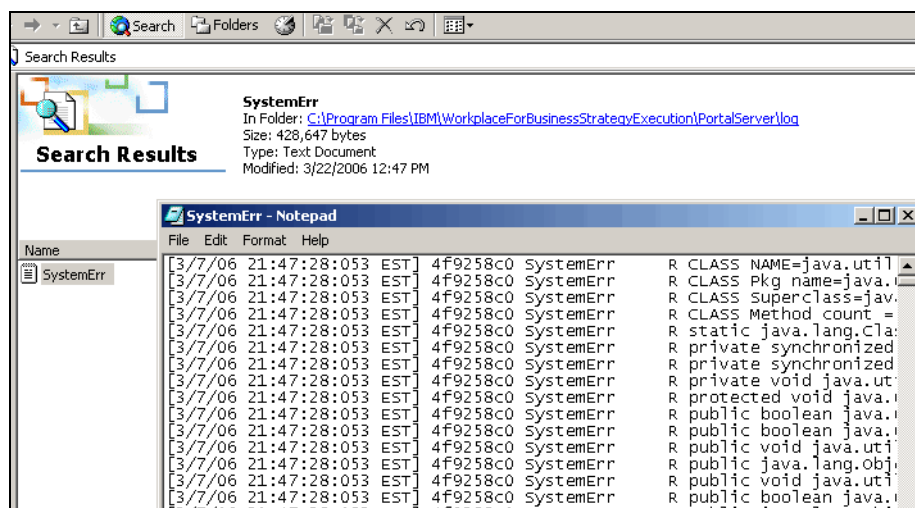


Figure 8-10 Example of SystemErr.log - viewing in Notepad

Tip: For more information about IBM WebSphere Portal, refer to the IBM Information Center online and select **WebSphere Portal Troubleshooting** → **Logging and Tracing** at:

<http://publib.boulder.ibm.com/infocenter/wpdoc/v510/index.jsp>

Tracing examples

There are times when tracing brings back additional information needed for problem solving. Table 8-13 presents a few example scenarios where tracing was used to provide additional details for the system administrator. This is not an exhaustive list, but provides you with a glimpse into how to approach troubleshooting.

Important: Turning on tracing affects system performance! We recommend that you turn this off when you are done tracing.

You may need to end and restart the system in order for the tracing parameter to take effect. A suggestion is that you do this at off-peak hours in a semi-isolated state, then reproduce the problem, capture the data, then turn off the tracing.

Table 8-13 Randomly chosen tracing examples

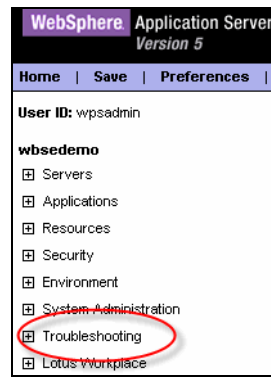
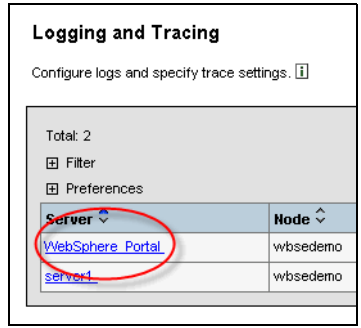
| The diagnostic scenario was: | The tracing parameter(s) used are: |
|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| A need to trace data acquisition. A need to obtain more comprehensive logged information. | Through portal administration. Change from the default setting of *=all=enabled to either high, medium, or low. For example: *=high=enabled. |
| A Need to diagnose a suspected problem with user attribute mapping. | Through portal administration. The trace specification that worked is com\ibm\lwp\bpm\portlet\mapuser.*=all=enable. |

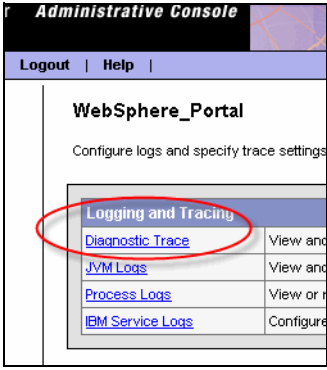
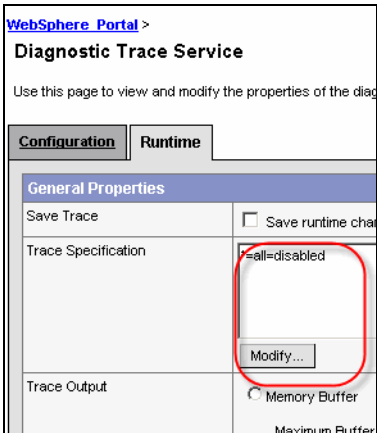
| The diagnostic scenario was: | The tracing parameter(s) used are: |
|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A problem was reported with hierarchy mapping. Support needs more information than what is normally in the logs. | Through portal administration. A trace specification that worked is <code>com.ibm.lwp.bpm\portlet\maphierarchy.*=all=enabled</code> . |
| A scorecard portlet appears to be problematic. More information is needed to diagnose the failure. | Through portal administration. Change from the default setting of <code>*=all=enabled</code> to <code>*=high=enabled</code> , or to (depending upon the information needed): <code>com.ibm.lwp.bpm.*=all=enabled</code> <code>com.ibm.lwp.common.graphreport.*=all=enabled</code> |

Accessing the IBM WebSphere Portal log and tracing controls

Follow the steps in Table 8-14 to access the WebSphere Portal settings for turning on tracing.

Table 8-14 Turning on tracing - general steps

| Steps | Result or further described |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Log in to the Administrative Console. The default syntax for this URL is <code>http://<yourhost>:9091/admin</code>.</p> <p>Select Troubleshooting.</p> |  <p>The screenshot shows the WebSphere Application Server Version 5 Administrative Console. The 'Troubleshooting' menu item is circled in red.</p> |
| <p>2. Select Logs and Trace. Then select the WebSphere Portal Server.</p> |  <p>The screenshot shows the 'Logging and Tracing' configuration page. The 'WebSphere Portal' server entry is circled in red.</p> |

| Steps | Result or further described |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| 3. Select the link for Diagnostic Trace . |  |
| 4. Enter in the trace instructions according to the desired information you wish to trace. Note: We do not recommend tracing as a rule; rather, trace as you need to for troubleshooting purposes. Generally, the directions would come from support staff. |  |
| 5. After entering the desired changes, click OK and save the configuration. | For more information about WebSphere Portal, consult the IBM Information Center at this URL |
| 6. You must end and restart the WebSphere Portal Server for the changes to take effect. | |
| 7. Gather the log files for inspection. | <ul style="list-style-type: none"> ▶ trace.log ▶ SystemOut.log ▶ SystemErr.log |

8.6 Navigation, views, and custom hierarchies

Here we talk about navigation, views, and custom hierarchies.

Overview

This section is for the system administrator interested in changing the user interface default navigation from the shipped hierarchy. This process is known as *setting hierarchy attributes*.

Hierarchies defined

Hierarchies refer to the corporate structure. This structure can be based on different things. However, normally hierarchies are related to employee reporting structure. Figure 8-11 on page 171 shows the administrative display of several hierarchies (possible) plus the one

hierarchy that is the primary by organization. Other common structures include geography, projects, or departments.

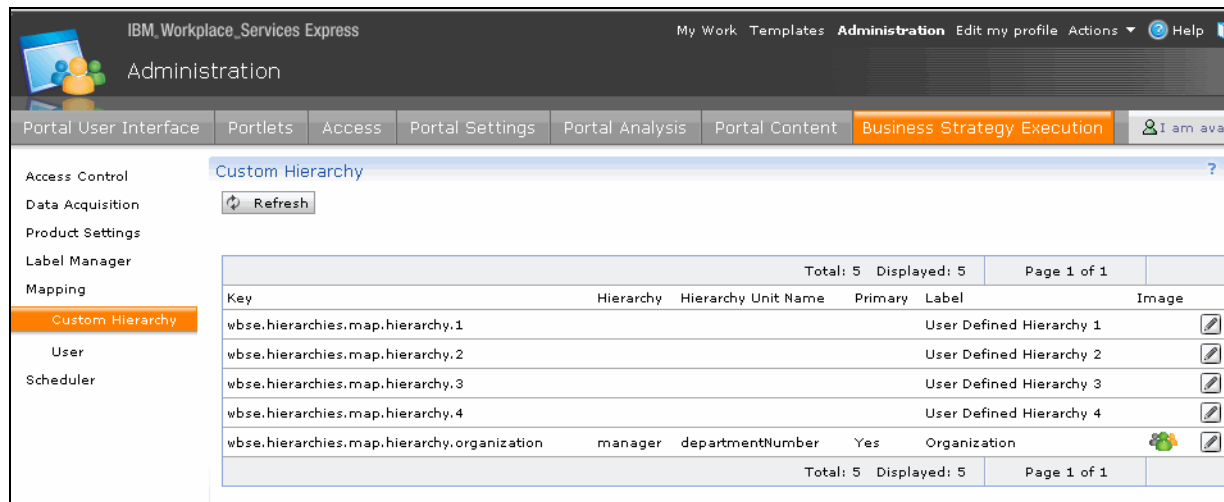


Figure 8-11 Hierarchies listing showing the default hierarchy by Organization

The Navigator displays on the left side of the user interface. For more on the hierarchy shipped with Workplace for Business Strategy Execution (default), see “The Navigator, Search, and Alerts components” on page 19.

Hierarchies and the Navigator

Workplace for Business Strategy Execution has a built-in Navigator in the user interface that presents information according to a specified primary corporate hierarchy. The view that a user sees is determined by the navigator. Table 8-15 describes the process.

Table 8-15 How the user's views are determined by the system

| If the default navigator is: | Then the tabbed views indicate: |
|-------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Not changed from the default values (not customized at all) | A view that uses employee names. A view that uses the hierarchy display name. |
| Customized | Whatever the chosen primary hierarchy is. Up to five additional hierarchies can be used (which would show as five tabbed sections). |

Restriction: If you want to create custom hierarchies in Navigator, user information and attributes must be stored in an LDAP directory, and that LDAP server must be configured appropriately with the underlying portal software. For more on LDAP, refer to the online help or 8.8, “Lightweight Directory Access Protocol (LDAP)” on page 179.

The user is shown a hierarchical view of information. In most organizations, this is based on something such as organization or department. However, the criteria determining navigation can be changed by the administrator. Figure 8-12 shows the default Navigator for an example user.

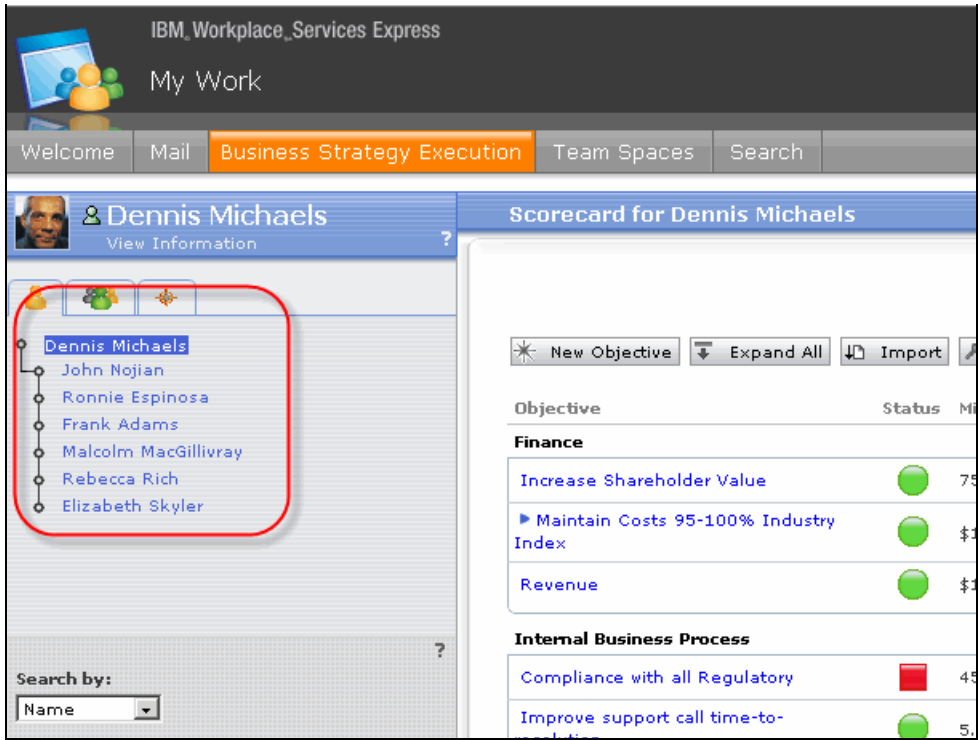


Figure 8-12 User interface with default hierarchy (Navigator) highlighted

Attention: Changes in default navigation affect the entire system. There is no way currently to specify different structures for different users.

8.6.1 Navigator components

The Navigator has two components: a hierarchy tree and search. Each Workplace for Business Strategy Execution user navigates from their scorecard according to the constraints used within the hierarchy. Users cannot change a hierarchy from one type to another. However the administrator can create alternate custom hierarchies that uses can then use for navigation. Components are shown in Table 8-16.

Table 8-16 Navigator components

| Component | Further defined |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hierarchy tree | <ul style="list-style-type: none">► Displays the organizational structure.► Displays from either a user or custom hierarchy perspective. |
| Search | Allows the user to search for others within the organization. |

8.6.2 Navigation process

At the top of the Navigator are tabs that the user chooses according to the information presentation desired. When the user navigates to the respective hierarchy, the scorecard information is updated and displayed accordingly. For example, the administrator created a new navigator. She chose to customize it so that the view would be by organization. She also created a custom hierarchy by department and one by title. In this case, the user would see three tabbed sections, and choose a different tab according to the presentation desired.

Custom hierarchies

Custom hierarchies allow an administrator to specify a different tree structure of the information for users. Figure 8-13 is an example of a custom hierarchy.

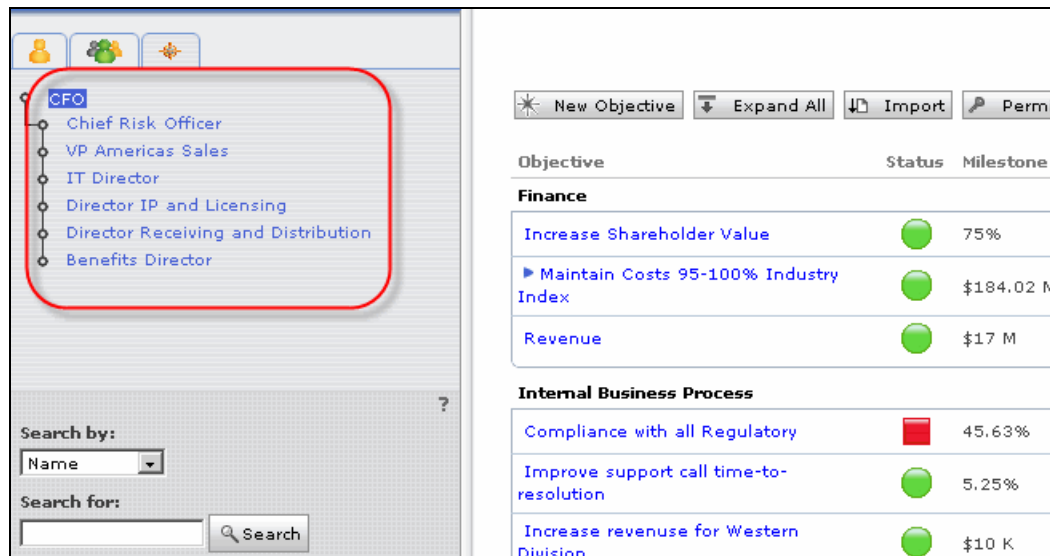


Figure 8-13 Custom hierarchy example

8.6.3 Guidelines for changing navigation

There are a few rules governing navigation that influence corporate decisions with regard to changing the default navigation. These are discussed in detail in the IBM Information Center Online help. However, use Table 8-17 to help guide your choices as an administrator.

Table 8-17 Changing navigation - what's important

| Guideline | Further described |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Up to five hierarchies can be created to display in the navigator. | Each displays as a single tab. |
| Each hierarchy requires two specific attributes for each user: an attribute to form the hierarchy structure and a second attribute to contain the hierarchy display name. | <ul style="list-style-type: none">▶ A hierarchy structure attribute that points to the distinguished name (DN) for the user that is immediately above them in the hierarchy.▶ A hierarchy display attribute that points to the hierarchy name that displays in Navigator. |
| To build your own custom hierarchies, you must use an LDAP directory server. | LDAP is not provided with Workplace for Business Strategy Execution. For more on LDAP, consult the IBM Information Center online help at http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp . |

| Guideline | Further described |
|----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| User attribute mapping affects what users are able to see and view. You can map attributes for use in the Navigator. | Example choices are name, department, phone number, and e-mail address. |

Important: Supported LDAP directories for this release are listed in the IBM Information Center online. Select **Administrators Guide** → **Administering the Server** → **Supported LDAP directories** at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

Administrators can create up to five hierarchies. One will always be the primary, with the others as tabbed choices within the user interface.

8.7 Alerts and events

Workplace for Business Strategy Execution alerts and events work in tandem. As events are processed, certain information is collected and used for alerts.

The process

- ▶ The company chooses how much information relative to Workplace for Business Strategy Execution that the users need to see in their workspace. The choices are from none (0) to seven (7) days worth.
- ▶ The administrator changes the default settings to fit this choice, as detailed in 8.7.2, “Changing the My Alerts settings” on page 177.
- ▶ In production, certain items are updated through various means.
- ▶ Objectives are completed, milestones are met (or unmet), and scorecards are changed.
- ▶ The processing happens regularly; however, the administrator can define an *event* to cause the update to happen.

Figure 8-14 on page 175 shows the event creation process.

Tip: Events that are likely to be processor intensive can be scheduled for off hours. Events can be scheduled to run at specific times and dates.

Scheduler

New Event

* Event name: **Name the Event**

* Tasks:

- ☒ Data acquisition
- ☒ Roll-up calculation
- ☒ Alert notification

Task Choices

* Frequency:

-nothing selected-

- nothing selected-
- One-time event
- Daily
- Weekly
- Monthly by date
- Quarterly
- Semi-annually
- Annually

Frequency Choices

Figure 8-14 Sample Event creation - Several choices are available

The Scheduler

The administrator can set up events to suit the business needs. These are done through the Scheduler controls. As shown in Figure 8-15, and as explained in Table 8-18 on page 176, there are several event types. The administrator can schedule an event to run at a certain time, or schedule an event to run immediately, as a *run once* event.

Administration

Portal User Interface | Portlets | Access | Portal Settings | Portal Analysis | Portal Content | **Business Strategy Exec**

Access Control | Data Acquisition | Product Settings | Label Manager | Mapping | **Scheduler**

Scheduler

Scheduled Events

| Event | Status | Frequency | Next Run | Last Run | Progress |
|----------------|--------|-----------|----------|----------|----------|
| One time event | ✓ | One time | | 3/8/06 | |
| Test event | ⌚ | One time | 3/16/06 | | |
| Test event | ⌚ | One time | 3/16/06 | | |
| testing | ✓ | One time | | 3/16/06 | |
| Alert task | ⌚ | Weekly | 3/30/06 | | |

Total: 12 Displayed: 10 Page 1 of 1

Figure 8-15 The Scheduler - showing Workplace for Business Strategy Execution events and status

Events overview

The Workplace for Business Strategy Execution system allows several types of events. These events are listed and explained in Table 8-18. Each event type has a corresponding time, status, and is viewable by the administrator. When creating events, the administrator must choose the event task based on the desired result.

Table 8-18 Event tasks described

| Event type | Further explained |
|--------------------|-----------------------------------------------------------------------------------------------------------------|
| Data acquisition | Data acquisition event tasks allow the users to acquire data from an external data source. |
| Roll-up | To roll up calculations based on actual values, choose roll-up. |
| Alert notification | Use this for events that need to send alert messages for things, such as milestones, trends, and status updates |

Restriction: If you run roll-up events instead of aggregate automatically, anything uploaded via spreadsheets will not roll up. The only way to get spreadsheet imported data to roll up is to use real time aggregation. This is a known issue for the current release.

Managing events

The Scheduler tracks several items for events - the event name, status, frequency, next and last run time, progress, and actions. Depending upon the event status, as an administrator, you can review the status and take action for a given event. Allowable actions also depend upon the event type and status. Table 8-19 lists event actions.

Table 8-19 Event actions and descriptions

| If the administrator chooses this event action: | Then: | Further information |
|-------------------------------------------------|----------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Cancel | A scheduled event is cancelled. | The event will not restart. |
| Delete | This removes the event entry record from the Scheduled Events table. | The event cannot be rerun. |
| Resume | The event will run in the future. | This is only valid for suspended events. |
| Suspend | This pauses a scheduled event. | The event will not run unless the administrator chooses to resume. |
| View event details | The administrator can view scheduled event criteria. | |
| View event log | The administrator can view the event log. | Completed events only are shown in the log. The log shows start/end dates along with messages. |

8.7.1 Alerts overview

Workplace for Business Strategy Execution has a built-in alerting mechanism to send important information out for users. These alerts appear on the user's workspace.

How alerts work

- ▶ Alerts are generated by the scorecard, command API, and the Alert Checking Activity components.
- ▶ Alerts occur when an alert criteria is met.
- ▶ Alerts are logged into the Alert Table.

Types of alerts

There are twelve types of alerts in the Workplace for Business Strategy Execution system. Table 8-20 shows a few examples.

Table 8-20 Alert examples: a few of the twelve types of Workplace for Business Strategy Execution Alerts

| Alert ID and Subject | Information generated | An expected action button |
|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| A_007 A milestone has been reached for {0}. {0} objective/initiative name | The (0) milestone has been reached for {}. Please attach a summary report for the period. (0) = milestone date {1} = objective/initiative name | No action taken. The "Take action" option does not appear in the user's contextual menu. |
| A_011 A linked item has been completed for {0}. {0} = person's name | {0} has completed {1}, which was linked to your item named {2}. Please review to ensure there are adequate items to reach the goal. {0} = person's name {1} = objective/initiative {2} = parent objective/initiative's name | The user is taken to their scorecard. |
| A_001 Scorecard approval is required for {0}. {0} = person's name | {0} has submitted a scorecard for your review. Please review and then approve or return it. {0} = person's name | The user is taken to {0}'s scorecard via the Action Button. |

8.7.2 Changing the My Alerts settings

As installed, alerts are already working. However, you may wish to customize the user interface (presentation) characteristics of alerts.

Important: The default for alerts is to *not* show alerts to users. Therefore, if you wish users to see alert-based messages, you will have to change the My Alerts settings.

The items in Table 8-21 can be modified.

Table 8-21 Changing the My Alerts settings

| If your goal is | Then consider making this change |
|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| You want users to see alerts that show a completion status. | In the showCompletedAlerts field, type true. Enter the number of days you wish for alerts to show to the users (between 0 and 7 days only). |
| You do not want users to show items that have been completed. | In the showCompletedAlerts field, type false. Note: This is the default setting! |

Note: Some alert types are informational and do not require or accept response(s). See the IBM information center at:

<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>

ITSO Insurance Company - Changing the My Alerts settings

The ITSO Insurance Company management team would like users to see completed scorecard and related activity information. They decide that five days is sufficient information for viewing.

Process

1. The administrator logged into the system with administrator access.
2. The administrator then selects **Administration** → **Portlets** → **Manage Portlets**.

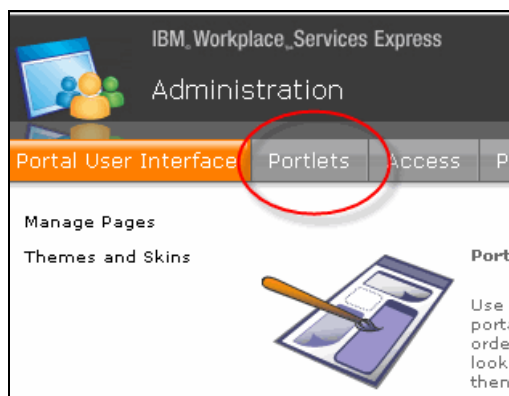


Figure 8-16 Administration - managing portlets

3. In the Portlets field, she searched on the string My Alerts to locate the portlet.
4. After locating the portlet, she chose the wrench icon to edit the portlet (see Figure 8-17 on page 179).

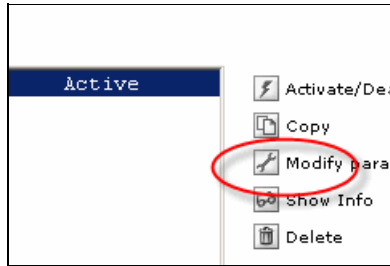


Figure 8-17 Edit the portlet

5. Since the goal was to change from the default (false) or no alerts to true (showing alerts) and for only five days, she made these changes (see Figure 8-18).

| Parameter | Value | |
|-----------------------------------------------------------------------|-------------------------------|--------|
| <input type="checkbox"/> helpjsp | WEB-INF/alerts/alertsHelp.jsp | Delete |
| <input type="checkbox"/> c2a-action-descriptor | /wsdl/alerts.wsdl | |
| <input checked="" type="checkbox"/> showCompletedAlerts | true | |
| <input checked="" type="checkbox"/> numberOfDaysToShowCompletedAlerts | 5 | |
| <input type="checkbox"/> editjsp | WEB-INF/jsp/html/edit/alerts | |
| | | + Add |

Edit Locale Specific Titles :

| Locale | Title | |
|--------|-------|--------------|
| | | Set title fo |

Figure 8-18 Changing the default My Alerts and allowing for five days of information

Important: Portlet changes have a Save button toward the bottom (scroll down). Always choose **Save** if you want to save your changes to the system.

8.8 Lightweight Directory Access Protocol (LDAP)

Workplace for Business Strategy Execution Version 1.0 supports the use of Lightweight Directory Access Protocol (LDAP). In fact, using LDAP is necessary for certain system features to operate efficiently. Regardless of whether you choose to use LDAP or not, there are certain steps you need to follow as well as the order of steps for success.

In brief, Workplace for Business Strategy Execution can be configured to use LDAP, and specifically, the following versions are supported.

- ▶ IBM Tivoli® Directory Server V5.2
<http://www.ibm.com/software/tivoli/products/directory-server/>
- ▶ IBM Tivoli Directory Server V5.1
<http://www.ibm.com/software/tivoli/products/directory-server/>
- ▶ Lotus Domino Enterprise Server 6.5.x
<http://www.lotus.com/home.nsf/welcome/dominoapplicationserver>

- Microsoft Active Directory 2000

<http://www.microsoft.com/windows2000/technologies/directory/ad/default.asp>

Important: If you plan to use an existing LDAP user registry, you should perform the appropriate configuration steps as soon after installation as possible. Note that it is possible to enable LDAP at a later point; however, users stored in the default user profile repository cannot be transferred.

8.8.1 Installation choices

As an administrator, when implementing Workplace for Business Strategy Execution in your existing environment, the following scenarios are possible. The steps are similar for both, but we provide Table 8-22 to help you mirror installation and implementation planning correctly. As always, use this as a guideline and refer to the most recent help online at the IBM Information Center for Workplace for Business Strategy Execution.

Table 8-22 LDAP scenarios for Workplace for Business Strategy Execution Team Edition

| LDAP scenarios | Rationale | Further explained |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scenario 1 - The ITSO Insurance Company does not currently use LDAP. You want to install Workplace for Business Strategy Execution and then later on install/configure LDAP for use with Workplace for Business Strategy Execution. | This scenario also fits if the company has installed Workplace for Business Strategy Execution and then plans to install LDAP in the company. | This fits if you are not ready to implement LDAP yet, and want to use Workplace for Business Strategy Execution right away. |
| Scenario 2 - ITSO Science Museum Company has an existing LDAP directory. | This scenario also fits if you install Workplace for Business Strategy Execution and want to use the system for a while with Cloudscape, then change over to using LDAP. | This is also appropriate if you need to get up and running on Workplace for Business Strategy Execution quickly, or are testing a proof of concept with the sample data initially. See "Sample data" on page 158 for more on the sample data. |

8.8.2 LDAP guidelines

LDAP products differ from one another. We recommend keeping the following items in mind as you configure and plan for LDAP and Workplace for Business Strategy Execution.

- Avoid creating *new* users if you plan to migrate to LDAP later on.
- All LDAP servers may not be compliant. Keep the LDAP documentation handy for your LDAP server.
- LDAP may be installed on a different machine or operating system.
- Since Workplace for Business Strategy Execution installs using Cloudscape, there will be some manual steps involved in modifying the Cloudscape database.
- You will also need to manually update the Update the Document Manager administrative ID and password.

Attention: If the site is configured to use an LDAP directory, the user access control policies for IBM Workplace for Business Strategy Execution are dependent on how user information and attributes are set up in the LDAP directory.

8.8.3 Updating the object IDs in the Cloudscape database

This topic provides the steps for updating the object IDs that are associated with users or groups in the Cloudscape database.

When to update the object IDs

Do these steps anytime you change the DN of the administrator user or group or of other users and groups. A specific example of when you would perform these steps is after you create the IBM Workplace for Business Strategy Execution administrator ID in your LDAP directory.

Steps: Updating the object IDs in Cloudscape using CView

Step 1: Stop all servers. To stop all servers, type the `stopWorkplaceServices` command and the administrator ID and password. Then Navigate to
<install_root>\PortalServer\rootscripts\stopWorkplaceServices.bat.

Step 2: At a command prompt, go to the `install_root\PortalServer\shared\app\cloudscape\bin` directory.

- ▶ Type `setCP` to set the classpath.
- ▶ Type `cview` to launch Cview.
- ▶ Click **File** → **Open**.
- ▶ Browse to select the database.
- ▶ Open the database, and navigate to the **PRINCIPAL** table (see Figure 8-19).

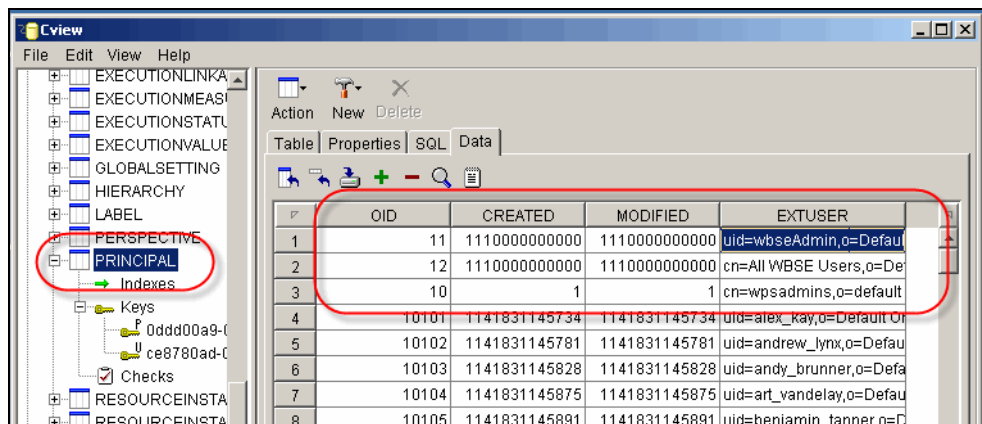


Figure 8-19 Example: Accessing the **PRINCIPAL** table using CView

Step 3: Go to the row where OID is 11. This row is usually at the top. If it is not at the top, then sort to find it. Change the value in the **EXTUSER** column to the full directory name (DN) of administrator user (for example, "o=yourco.com").

Step 4: Go to the row where OID is 12. Change the value in the **EXTUSER** column to the full DN name for all users.

Step 5 - Go to the row where OID is 10. Change the value in the EXTUSER column to the full DN name for the administrators group.

Step 6 - Click **OK**. Close the database and exit.

8.8.4 Updating the Document Manager administrative ID and password

This task is required after you connect IBM Workplace for Business Strategy Execution to an LDAP server.

During the IBM Workplace for Business Strategy Execution installation, a default administrative user account is set up for document management, and the user ID is `wbsePDMAAdmin`. After you connect to an LDAP server, the DN name changes for this account and the account is no longer recognized. You can reset the administrative account information through Administration.

Perform the following steps to reset the administrative user account ID and password:

Step 1: Log in to the site with the administrative user ID and password, select **Administration** → **Portlets** → **Manage Portlets**, and search for the string *scorecard* in the Title contains field (see Figure 8-20).

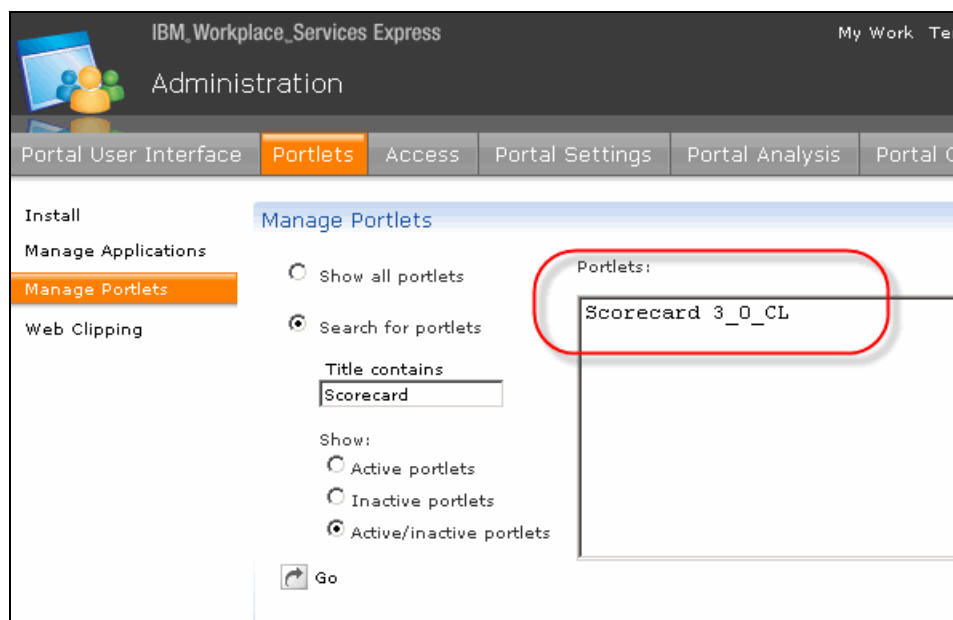


Figure 8-20 Searching for the scorecard portlet

Step 2: Highlight the scorecard portlet. The title of the scorecard portlet might resemble the following: `Scorecard_3_0_L`.

Step 3: Choose the **Modify parameters** icon and go into edit mode.

In the box provided in the Edit Parameters area, type the parameters `PDMUserID` and `PDMPassword`, and then click **Add**. Use the value for the new Document Manager ID and password for the administrator user account and password. An example is shown in Figure 8-21 on page 183.

Manage Portlets

Portlet Name : Scorecard

Edit Parameters :

| Parameter | Value | |
|------------------------------------------------|-----------------------------|--------|
| <input type="checkbox"/> j8y71ax | PDMPassword | Delete |
| <input type="checkbox"/> DRich | PDMUserID | |
| <input type="checkbox"/> helpjsp | WEB-INF/scorecard/scorecard | |
| <input type="checkbox"/> c2a-nls-file | com.ibm.lwp.bpm.portlet.sco | |
| <input type="checkbox"/> c2a-action-descriptor | /wsdl/scorecard.wsdl | |
| <input type="text"/> | <input type="text"/> | Add |

Edit Locale Specific Titles :

| Locale | Title | |
|--------|-------|-------------|
| | | Set title f |

Figure 8-21 Adding PDMUserID and PDMPassword to the scorecard portlet

Click **Save** at the bottom of the window.

8.8.5 Scenario 1 - ITSO Insurance Company - Install Workplace for Business Strategy Execution then configure for a new LDAP using IBM Lotus Domino LDAP

Scenario 1 overview

The ITSO Insurance Company plans to install Workplace for Business Strategy Execution Team Edition Version 1.0. There is no existing LDAP. The administrator installs Workplace for Business Strategy Execution, then a few weeks later decides to install an IBM Lotus Domino Server and implements LDAP using Domino. Subsequently, he configures Workplace for Business Strategy Execution to use the IBM Lotus Domino LDAP.

Requirements

- ▶ IBM Lotus Domino server Version 7 installation files
- ▶ Workplace for Business Strategy Execution Team Edition Version 1.0 installation files
- ▶ Network connectivity

Scenario 1 steps

The administrator researched and devised a list of steps, as shown in Table 8-23.

Table 8-23 Installing Workplace for Business Strategy Execution then installing Domino LDAP

| Steps | Process or further defined |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Install Workplace for Business Strategy Execution Team Edition. | The installation automatically configures using Windows Member Manager (WMM). |
| 2. Install IBM Lotus Domino, and do these steps: <ul style="list-style-type: none"> a. Configure IBM Lotus Domino LDAP. b. Make sure that the LDAP is writable (not read-only). c. Verify that the Domino LDAP has the uid attribute set to be queried. This can be done via Domino Server Administration, or via the command-line ldapsearch tool. | Workplace for Business Strategy Execution will need the ability to add items to the LDAP. |
| 3. Use the system with the sample data supplied. See "Sample data" on page 158 for more on the sample data. | This sample data is automatically installed. |
| 4. When ready to use the system with LDAP, uninstall the sample data. See "Removing sample data" on page 159. | This is easily done. See "Sample data" on page 158. |
| 5. Follow the instructions in the IBM Workplace Services Express Version 2.5 Information Center at http://www.ibm.com/software/workplace/servicesexpress/library/ to connect to an LDAP directory server. | |
| 6. Create an administrator user ID in the Domino LDAP directory server, by adding a user named wbseAdmin. <ul style="list-style-type: none"> ▶ The user ID should be wbseAdmin. ▶ The password should be wbsePass. ▶ Add this user to the portal administrative group (usually wpsadmins). | IBM Workplace for Business Strategy Execution uses wbseAdmin as a reserved administrator name, therefore this will need to be added to the LDAP repository. |
| 7. Create a group in Domino called "All WBSE Users". Use the appropriate group suffix used in this LDAP. | The suffix (o=Default Organization) will need to be modified to match what is in the LDAP server like (cn=users,dc=yourco,dc=com, or cn=groups,dc=yourco,dc=com). |
| 8. Update the object IDs in the Cloudscape database. | Refer to this section "Steps: Updating the object IDs in Cloudscape using CView" on page 181. |
| 9. Update the Document Manager administrative ID and password. | This is done through the administration user interface. See instructions in 8.8.4, "Updating the Document Manager administrative ID and password" on page 182 |

8.8.6 Scenario 2 - ITSO Science Museum - Install Workplace for Business Strategy Execution and then configure for an existing LDAP

Here we discuss installing Workplace for Business Strategy Execution and then configuring for an existing LDAP.

Scenario 2 overview

In this scenario, the ITSO Science Museum plans to install Workplace for Business Strategy Execution Team Edition Version 1.0. There is supposedly no existing LDAP. The administrator installs Workplace for Business Strategy Execution, then a few weeks later discovers a departmental Lotus Domino Server running a Domino LDAP with all the organization's people in it. Subsequently, he configures Workplace for Business Strategy Execution to use the Domino LDAP.

Requirements

- ▶ IBM Lotus Domino server Version 7 installation files
- ▶ Workplace for Business Strategy Execution Team Edition 1.0 installation files
- ▶ Network connectivity

Scenario 2 steps

The administrator researched and devised a list of steps, as shown in Table 8-24.

Table 8-24 Installing Workplace for Business Strategy Execution and later on integrating with an existing LDAP

| Steps | Further explained |
|-----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Install Workplace for Business Strategy Execution Team edition. | |
| 2. Uninstall the sample data. See "Removing sample data" on page 159. | This is done by the Portal Administrator by selecting Administration → Business Strategy Execution → Product Settings → Sample Data . |
| 3. Follow the instructions in the IBM Workplace Services Express Version 2.5 Information Center to connect to an LDAP directory server. | The URL is http://www.ibm.com/software/workplace/servicesexpress/library/ . |
| 4. Within your LDAP, make sure that LDAP is writable, not read-only; we must have ability to add items to the LDAP. | Workplace for Business Strategy Execution uses an ID called wbseAdmin internally, so this will need to be added to the LDAP Server. |
| 5. Create a Workplace for Business Strategy Execution user ID called wbseAdmin; the password should be wbsePass. | |
| 6. Create a group called "All WBSE Users" and add it with the appropriate group suffix used in this LDAP. | The suffix (o=Default Organization) will need to be modified to match what is in the LDAP server, such as cn=users,dc=yourco,dc=com, or cn=groups,dc=yourco,dc=com. |
| 7. Update the object IDs in the Cloudscape database. | Refer to "Steps: Updating the object IDs in Cloudscape using CView" on page 181. |

| Steps | Further explained |
|----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| 8. Update the Document Manager administrative ID and password. | This is done through the administration user interface. See 8.8.4, "Updating the Document Manager administrative ID and password" on page 182. |

8.9 Dashboard administration

Workplace for Business Strategy Execution dashboards are essentially different Portal pages that contain a set of portlets useful to an end user in context to one of their objectives. As the Workplace for Business Strategy Execution Administrator, you may need to create pages for users so that they can be linked to the scorecard. Creating pages can be done from the Administration tools of the Portal.

In order to link a scorecard objective or initiative to a dashboard page, the page needs to have a Custom Unique Name, assigned by the Administrator. In order to give a page a Custom Unique Name, select **Administration** → **Portal Settings** → **Custom Unique Names**. Here you can search for the page title and give it a unique name.

Attention: Portal pages created by users will not be able to link to an objective, as Administrators cannot give custom unique names to user created pages. Users can link to these types of pages using the URL for the page and linking to an "external resource" instead of a "portal resource".

Other tasks you may need to do in relation to the dashboards are:

- ▶ Install new portlets.
- ▶ Grant users access to portlets and portal pages.
- ▶ Configure portlets.
- ▶ Create forms portlets using the Designer tools.

8.10 Application development

Workplace for Business Strategy Execution allows integration with WebSphere Portal based applications via portlets. This section provides general details and resources for portlet creation and development. As an administrator, you may be the developer, or may work with developers and need to provide technical support for them so that they can deploy portlets within Workplace for Business Strategy Execution.

8.10.1 Portlets are applications

Portlets are small applications that are independently developed, deployed, managed, and displayed. Administrators and users compose personalized pages by choosing and arranging portlets, resulting in customized Web pages.

Why develop portlets for Workplace for Business Strategy Execution?

Workplace for Business Strategy Execution architecture is WebSphere Portal-based. What this means is that application development in this realm is through portlet development. Development and integration of additional content can enhance your Workplace for Business Strategy Execution site. The content can be used for the following items:

- ▶ Integration with current Workplace for Business Strategy Execution processes, such as objectives, initiatives, and workflow
- ▶ Obtaining new information needed to support information processing using Web Services

Requirements, skills, and resources

Portlet development requires programming skill, including skill with technologies used by the portlets. These skills range from Java to J2EE™ to XML, for example. Fortunately, there are IBM resources to help developers with writing portlets.

- ▶ WebSphere Portal Zone
<http://www.ibm.com/websphere/developer/zones/portal/>
- ▶ WebSphere Portal Library
<http://www.ibm.com/developerworks/websphere/zones/portal/proddoc.html>
- ▶ Portlet Development Guide for 5.0.2
- ▶ Javadoc™
- ▶ Using JSR 168 with WebSphere Portal 5.0.2.1
- ▶ Using WSRP services with the IBM WebSphere Portal Version 5.0.2 Cumulative Fix 1 (5.0.2.1)
- ▶ For portlet development tools, see the IBM Portal Toolkit at:
<http://www.ibm.com/websphere/portal/toolkit>

Tip: For the most up-to-date information about portlets, including the latest portlets that are available for download, visit the IBM Workplace Solutions Catalog at:

<http://catalog.lotus.com/wps/portal/workplace>

8.10.2 Creating portlets for Workplace for Business Strategy Execution use

Portlets created with portal-based development tools can be used in Workplace for Business Strategy Execution if they are enabled for Workplace for Business Strategy Execution. Enabling portlets for Workplace for Business Strategy Execution allows the portlet to communicate with Workplace for Business Strategy Execution tools. It can also allow the portlet to use Web Services. Web Services is one method of integrating information into the Workplace for Business Strategy Execution system. See 7.1.2, “Data acquisition methods” on page 130 for more information.

Enabling a portlet for Workplace for Business Strategy Execution

Portlet programming methods and procedures may vary with regard to the application design needs and tooling at a high level. Table 8-25 shows the process you would follow when enabling a portlet for Workplace for Business Strategy Execution.

Table 8-25 Process flow - portlet development to Workplace for Business Strategy Execution deployment cycle

| Process | Further described |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Choose the development tool, and develop a portlet for Workplace for Business Strategy Execution that supports the EDIT mode. | The portlet must support the edit mode, defined in the portlet descriptor. |
| Download the file wems.wbse.client.proxy.jar to the directory /WEB-INF/lib. | The /WEB-INF/lib directory is part of the WAR file directory structure for the portlet. It denotes the location for storing the portlet JAR files. |
| Download the file wems.wbse.wsplugin.jar to the directory /WEB-INF/lib. | |
| Download and extract the contents of the file wems.wbse.wsplugin.jsp.zip to the directory called /jsp. | Two jsp files are in this zip: <ul style="list-style-type: none"> ▶ WBSEWebServiceEdit.jsp ▶ WBSEWebServiceView.jsp The /jsp directory is only a suggestion. You may package the JSP in any location outside of the /WEB-INF directory. |
| With the portlet in EDIT mode, ensure that the file WBSEWebServiceEdit.jsp displays. | |
| Choose one of these methods in order to use the jsp: <ol style="list-style-type: none"> 1. Use WBSEWebServiceEdit.jsp within your portlet. 2. Copy the contents of WBSEWebServiceEdit.jsp to your Edit mode JSP file. | |
| Extend the class com.ibm.lwp.wbse.wsplugin.ValueHandler by implementing these two methods: <ol style="list-style-type: none"> 1. Return a list of data names the portlet exposes. 2. Return the actual value when data is needed. | This is packaged within wems.wbse.wsplugin.jar. |
| Create your class, then package in your portlet. | |
| Add code to your portlet for the actionPerformed () method. | Information regarding this method is available in the Portlet Development Guide. |
| Deploy the portlet to WBSE. | Within WBSE, select Administration → Portlets → Install to install the portlet. |
| Create a page for the portlet. | |
| Set permissions for the portlet and the page. | |
| Notify users that the portlet is available. | Users will need to click the Edit icon to configure the portlet for use! The edit mode should present the Web Services endpoint URL and the list of data items exposed by the portlet. |

8.10.3 The Workplace for Business Strategy Execution Sample Dashboard portlet

Workplace for Business Strategy Execution ships with an available sample portlet that you may use to practice with. It is downloadable and usable after you install and configure Workplace for Business Strategy Execution. The sample portlet can be useful to help development teams gain experience with portlet deployment within Workplace for Business Strategy Execution. Dashboards are also covered in greater detail in Chapter 6, “Dashboard” on page 103.

ITSO Insurance Company portal skill building

In this scenario, the ITSO Insurance Company is interested in integrating with an existing application on another computer. This application is not architecturally similar to Workplace for Business Strategy Execution, but it does provide data that is needed by the company. ITSO Insurance programmers have Java programming skills, but need to learn more about portlet programming and deployment. They decide it is best to begin by installing the Sample Dashboard portlet supplied with the Workplace for Business Strategy Execution system.

Step 1: Log in as administrator and select **Administration** → **Business Strategy Execution** → **Product Settings**. Click the **Web Services** tab. Choose the Sample dashboard portlet with source code link and save it to a temporary directory (see Figure 8-22).

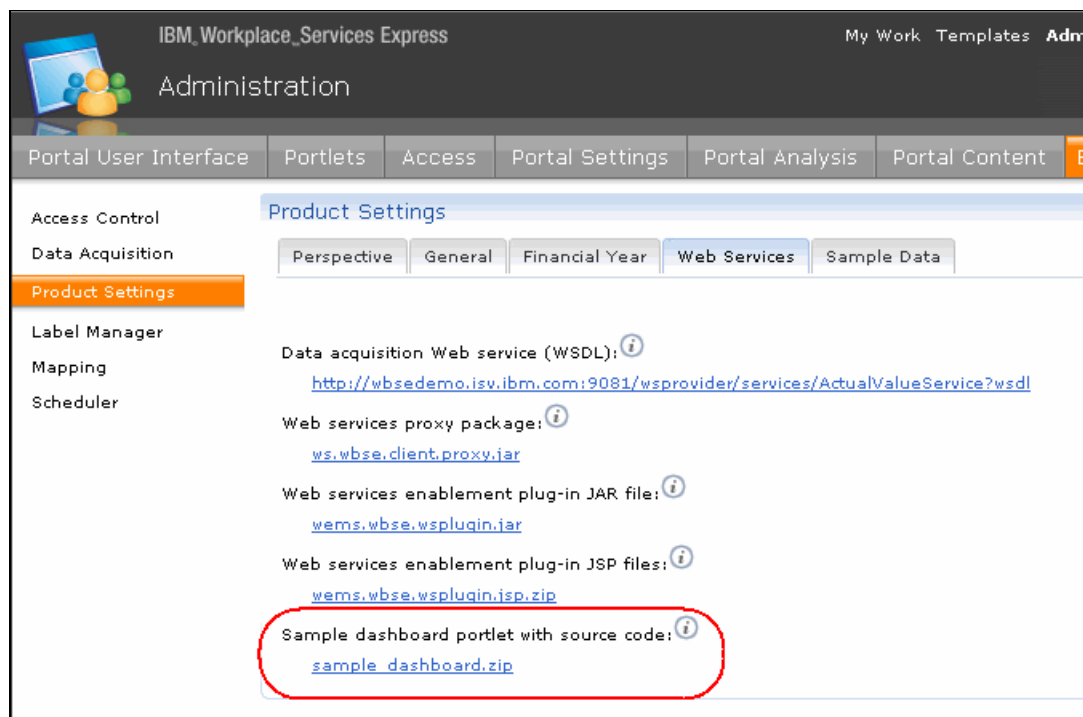


Figure 8-22 Downloading the Sample Dashboard portlet

Step 2: Choose **Portal** and then choose **Portlets** → **Install**, navigate to the directory, choose the file **sampleDashboard.WAR**, and then click **Next** to install (see Figure 8-23).

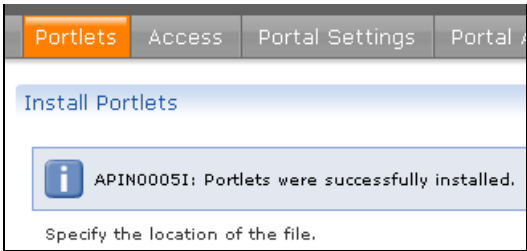


Figure 8-23 Successfully installing a portlet

Step 3: Grant users access to the Sample Dashboard portlet. Select **Administration** → **Access** → **Resource Permissions** → **Portlets**. Search for **Sample Dashboard**, click the **Assign access** symbol (see Figure 8-24), and choose the **Privileged User** role. Click **Add** and then select the users, such as authenticated portal users to grant access permission. Click **OK**, **Done**, and then **OK**.

| | | | |
|------------------------|-------------------------------------|-------------------------------------|--|
| Security Administrator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Delegator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Manager | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Editor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Privileged User | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| User | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Showing 1 - 7 of 7 Pa | | | |

Figure 8-24 Assigning access to a portlet

Step 4: The portlet is created now. The user has access to the portlet. The next step is to create a page for the portlet, and grant access to the page appropriately. Select the **Portal User Interface** in Administration. Click **Manage Pages**. In the Context Root, select **My Portal** → **Business Strategy Execution**, and then click the **New Page** button. Provide the title Sample Dashboard, and select the one column format, as shown in Figure 8-25 on page 191. Click **OK**.

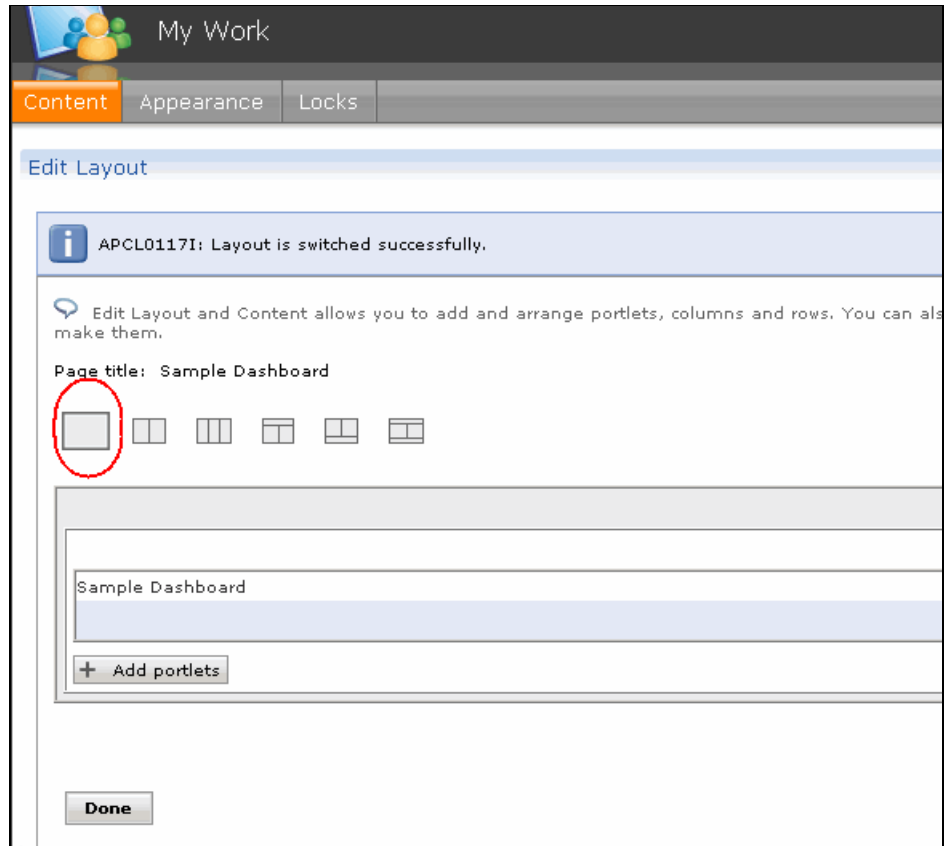


Figure 8-25 Example - placing a portlet on a page - one column format

Step 5: Now the portlet has been placed on the page, and you may begin using the portlet. Access the portlet through Workplace for Business Strategy Execution, as shown in Figure 8-26. The portlet can be used for creating objectives.

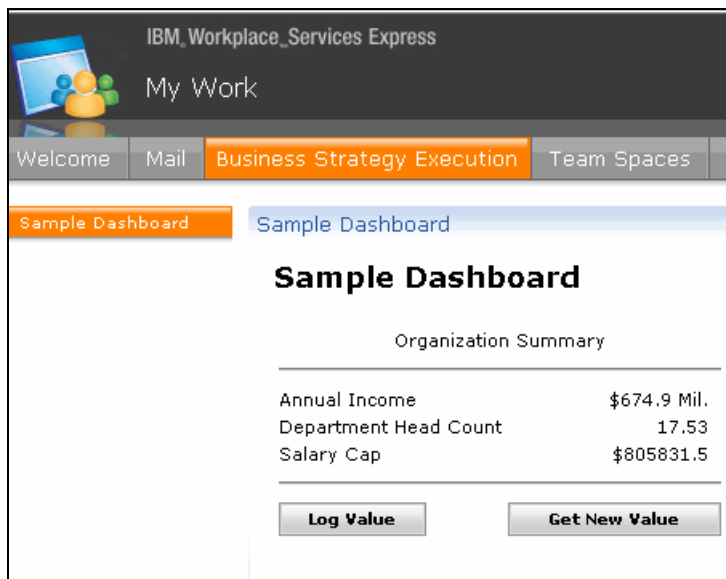


Figure 8-26 The Sample Dashboard portlet

How data propagates to the scorecard

Now that the page is created and has the Sample Dashboard portlet, people who have access can use it to populate actual values for an objective or an initiative. The Sample Dashboard portlet can be used only to log actual values.

Logging actual values to an objective

Step 1: Select **My Work** → **Business Strategy Execution** from the main page. The page name, in this case, is Sample Dashboard. From the scorecard, select **Create an Objective** and call the objective *sample db currency* and save it, accepting the default settings (See Figure 8-27).

Create an Objective
The **Objective name** you specify appears in your scorecard and is associated with a **Persp** type, and **Milestone**. Click **OK** to add to your scorecard.

* Objective name:
sample db currency

Description:
This is for the sample dashboard portlet.

Perspective:
Finance

Value type:
Currency

Milestone:
Monthly

* Beginning value:
0

* Target value:
500000

* Required field

OK Cancel

Figure 8-27 Creating an objective for the Sample Dashboard portlet

Step 2: Click **Sample Dashboard**. From the Sample Dashboard page, click the edit symbol. Type “sample db currency” in the Objective name field. This is the same as the objective you just created. Click **Save**. Click **Log Value** to log the actual value shown into the sample db currency objective. Then, to log another actual value, click **Get New Value**, and then click **Log Value** (see Figure 8-28 on page 193).

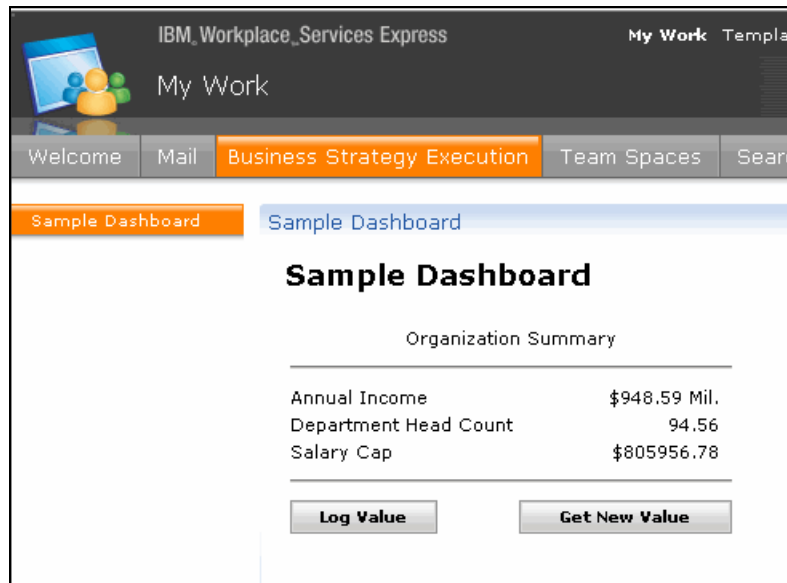


Figure 8-28 Adding values to an objective from the Sample Dashboard portlet

Step 3: You may now return to the scorecard and observe that the values have been added to the sample db currency objective as actual values (see Figure 8-29).

| Display results | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------|--------|------------|--------|------------|----------|--------|---------|
| New Objective Expand All Import Permissions This year | | | | | | | |
| Objective | Status | Milestone | Target | Actual | Variance | Change | Final |
| Finance | | | | | | | |
| Increase Shareholder Value | | 75% | | 77.07% | 2.77% | -5.25% | 100% |
| ► Maintain Costs 95-100% Industry Index | | \$184.02 M | | \$132.69 M | -27.89% | 0% | \$259.1 |
| Revenue | | \$17 M | | \$109.18 M | 542.22% | 0% | \$30 M |
| sample db currency | | \$2.32 K | | \$948.59 | -59.19% | 0% | \$500 |
| Internal Business Process | | | | | | | |
| Compliance with all Regulatory | | 45.63% | | 38% | -16.72% | 0% | 51.67 |
| Improve support call time-to-resolution | | 5.25% | | 50% | 852.14% | 100% | 100% |

Figure 8-29 Result after adding values through the portlet

Restriction: The data will not update in the scorecard unless the portlet is rendered on screen.



A

Looking forward

This appendix describes the direction that Workplace for Business Strategy Execution will be taking in future releases.

Note: Any future capabilities, features, or products that are discussed within this Redpaper appendix are current IBM plans, which are subject to change in whole or in part by IBM at any time, without notice.

What is coming in Workplace for Business Strategy Execution

This section shows the types of enhancements that are being designed for future versions of Workplace for Business Strategy Execution. This list is provided to give readers a sense of the general direction that future releases are heading. This list is not a definitive list of future features and may change at any time.

Web services security

A security model for Web services will be implemented so that secured data sources can be used with Workplace for Business Strategy Execution.

More flexible methods for creating objectives and initiatives

Here we discuss some possible methods for creating objectives and initiatives in new versions of Workplace for Business Strategy Execution.

Import new objectives and initiatives, milestone targets, and final targets into the system

End users will have the ability to import more than actual values in their scorecards. They will be able to import objectives, initiatives, milestone targets, and final targets as well. This will provide them the ability to create a brand new scorecard very quickly.

System spreadsheet import and export

We are planning on introducing new backup and restore features so that administrators will have the ability to export all of the data stored in Workplace for Business Strategy Execution to a spreadsheet and import it back into the system. This could be used as a backup file for the system or as a means for migrating from the Team Edition to Enterprise Edition.

Templates for measurements

Organizations will be able to create templates for an objective specifying how the objective should be measured and which targets to use. These will serve as a way to create company-wide objectives.

Status Type for objectives

There will be a new objective type in addition to percentage, number, currency, and boolean - Status Type. This will allow users to simply state the performance level of an objective as red, yellow, or green without needing to specify a number. This is especially useful for giving assessments on project performance.

Objectives without targets

Users will also be able to set up objectives without targets. This will allow them to track numeric data, like call center volumes, in their scorecard without needing to set a red, yellow, or green status on the data. Also, this will allow users to set up objectives and specify the targets at a later date.

Increased opportunities for collaboration

Here we discuss the possible increased opportunities for collaboration in new versions of Workplace for Business Strategy Execution.

Setting and pushing targets

When objectives are pushed, options will be included for specifying what gets pushed with the objective. This way, if you want to push your objective with all your milestone targets, you can.

Approvals and drafts

End users will be able to draft objectives that will begin on a date in the future. Also, every objective will be able to be approved by different approvers and at different times.

Support organizational changes and transitions

When people move out of a role, it will be easy to transfer their objectives and targets to another person.

E-Mail alerts

Users will be able to choose e-mail as an option to receive their alerts.

New methods for visualizing data

Here we discuss possible new methods for visualizing data in new versions of Workplace for Business Strategy Execution.

Mini scorecard portlet

There will be a smaller version of the scorecard available for end users to place on their dashboard pages or other area in the portal, giving them a quick view of their scorecard.

Bi-directional Status Map

The Status Map will be enhanced to show not only which objectives are contributing to yours, but also which objectives you are contributing to.



Additional material

This Redpaper refers to additional material that can be downloaded from the Internet as described below.

In the Chapter 7, “Data sources” on page 127, we talked about creating and using a Web service to access a Domino database. The files and instructions for enabling that particular Domino Web service on your own Domino 7.0 server are provided below.

Attention: A developers tutorial on how to create a Domino 7.0 Web service can be found at:

<http://www-128.ibm.com/developerworks/edu/i-dw-1s-domino7ws-i.html>

Domino 7 Web services are also highlighted in the *Lotus Domino 7 Application Development* Redpaper, REDP-4102 at:

<http://www.redbooks.ibm.com/abstracts/redp4102.html>

Locating the Web material

The Web material associated with this Redpaper is available in softcopy on the Internet from the IBM Redbooks Web server. Point your Web browser to:

<ftp://www.redbooks.ibm.com/redbooks/REDP4164>

Alternatively, you can go to the IBM Redbooks Web site at:

ibm.com/redbooks

Select the **Additional materials** and open the directory that corresponds with the Redpaper form number, REDP4164-00.

Using the Web material

The additional Web material that accompanies this Redpaper includes the following files:

| <i>File name</i> | <i>Description</i> |
|--------------------------|---------------------|
| webservices.zip | None |
| ws_exp.nsf | The Domino database |
| expenses.wsdl.xml | The wsdl XML file |

How to use the Web material

Create a subdirectory (folder) on your workstation, and unzip the contents of the Web material zip file into this folder. If you recall from Chapter 7, “Data sources” on page 127, the example “Expenses” Web service generates a random number. The number is representative of the amount of budget spent year to date. The Web service accepts a single value as input indicating the overall budget for the year. The Web service computes the portion of the budget that would be expended up through the current date as a portion of the entire year.

For example, if the Web service is executed on June 30th, and the budget were \$10,000, then the calculated portion would be \$4,958.90. To make it interesting, the Web service varies the result by a random amount of +/- 10%.

The Web service implements two methods. The first method returns only the random computed number. The second method has a compound return that includes the current date, the random computed number, the random computed number rounded to an integer, and a status value of 0:1:2. A status of “0” indicates the random computed value is less than or equal to the portioned budget. A status of “1” indicates the random computed value is not more than 5% above the portioned budget. A status of “2” indicates the random computed value is more than 5% above the portioned budget. Figure B-1 on page 201 and Figure B-2 on page 202 show the full LotusScript code for the Expense Web Service.

```

'Expenses:

'Options:
Option Public
Option Declare
%INCLUDE "lsxsd.lss"

'Declarations:
' ----- web service compound return type -----
Public Class ValueWithDatetime
    Private nDatetime As NotesDateTime
    Private nEpoch As NotesDateTime
    Public dDatetime As XSD_DATETIME
    Public lDatetime As XSD_LONG
    Public nNumber As Double
    Public nInteger As Long
    Public nStatus As Integer
    Private initialized As Variant

    Sub new
        initialized = False
        Set dDatetime = New XSD_DATETIME
        Set lDatetime = New XSD_LONG
        Call Me.SetDatetimeFromParts (1970, 1, 1, 0, 0, 0)
        Set nEpoch = nDatetime ' remember base for epoch = seconds since 1-1-1970
        nNumber = 0
        nInteger = 0
        nStatus = 0
        initialized = True
    End Sub

    Public Sub SetAll (nValue As Double, nBudget As Double)
        nNumber = nValue
        nInteger = Round (nNumber, 0)

        Dim target As Double
        target = nBudget * (((Month(Now())-1)*30.4)+Day(Now()))/365)
        If (target >= nValue) Then
            nStatus = 2 ' below budget so status is green
        ElseIf ((nValue / target) <= 1.05) Then
            nStatus = 1 ' within 5% of target so status is yellow
        Else
            nStatus = 0 ' more than 5% over budget so status is red
        End If
    End Sub

    Private Sub UpdateDatetimes ()
        Call Me.dDatetime.SetValueFromNotesDateTime (nDatetime)
        If initialized Then
            Call lDatetime.SetValueFromString (CInt (nDatetime.TimeDifference (nEpoch)))
        Else
            Call lDatetime.SetValueFromString (0)
        End If
    End Sub
End Sub

```

Figure B-1 The first section of LotusScript code for the Expense Web service

```

Public Sub SetDatetimeFromNotes (dt As NotesDateTime)
    Set nDatetime = dt
    Call Me.UpdateDatetimes ()
End Sub

Public Sub SetDatetimeFromNow ()
    Dim dt As New NotesDateTime ( "")
    dt.LocalTime = Now
    Call Me.SetDatetimeFromNotes (dt)
End Sub

Public Sub SetDatetimeFromParts (nYear As Integer, nMonth As Integer, nDay As Integer, nHour As Integer, nMinute As Integer, nSecond As Integer)
    Dim dt As New NotesDateTime ( "")
    dt.LocalTime = Datetime (nYear, nMonth, nDay) + Timenumber (nHour, nMinute, nSecond)
    If (nHour = -1) Then Call dt.SetAnyTime ()
    If (nYear = -1) Then Call dt.SetAnyDate ()
    Call Me.SetDatetimeFromNotes (dt)
End Sub

Public Sub SetDateFromParts (nYear As Integer, nMonth As Integer, nDay As Integer)
    Call Me.SetDatetimeFromParts (nYear, nMonth, nDay, -1, -1, -1)
End Sub

Public Sub SetTimeFromParts (nHour As Integer, nMinute As Integer, nSecond As Integer)
    Call Me.SetDatetimeFromParts (-1, -1, -1, nHour, nMinute, nSecond)
End Sub

End Class

' ----- web service class -----
Public Class Expense

    Sub new
        ' empty
    End Sub

    ' ----- simple single value returns -----

    ' this makes a number +/- 5% of the budget spend YTD and returns it
    Public Function BudgetSpend (budget As Double) As Double
        Dim target As Double
        target = budget * (((Month(Now())-1)*30.4)+Day(Now()))/365
        Randomize
        BudgetSpend = target + ((target / 10) - (Rnd() * (target/5)))
        BudgetSpend = Round(BudgetSpend, 2)
    End Function

    ' ----- compound return values -----

    ' this makes a random number between 0 and the provided range and returns it along with the current date
    Public Function BudgetSpendWithDatetime (budget As Double) As ValueWithDatetime
        Dim vwd As New ValueWithDatetime
        Call vwd.SetDatetimeFromNow ()
        Call vwd.SetAll (BudgetSpend (budget), budget)
        Set BudgetSpendWithDatetime = vwd
    End Function

End Class

```

Figure B-2 The second section of LotusScript code for the Expense Web service

With your Domino 7.0 server running, launch Domino Designer and open up the ws_exp.nsf database. The example Web service must be configured as part of the development process. The configuration is done through the Web Services properties dialog box. The important settings include the name, port type, programming model, SOAP message format, port type name, service element name, and the service port name.

Figure B-3 on page 203 through Figure B-8 on page 205 show how to get to the Web services properties boxes and how to change the necessary settings. Inside Designer, select **Shared code** from the left navigator (Figure B-3 on page 203).

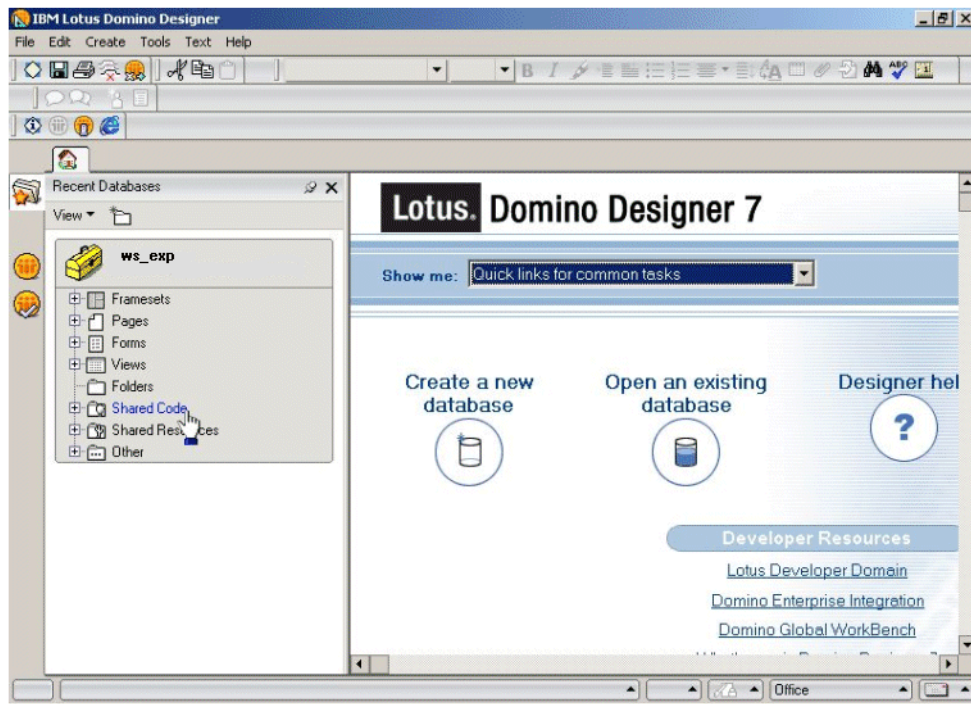


Figure B-3 Select Shared Code

Select **Web Services** (Figure B-4).

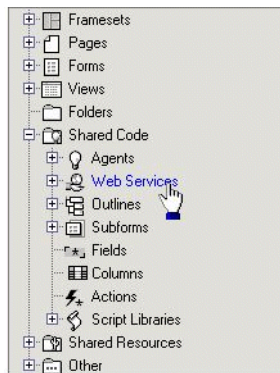


Figure B-4 Select Web Services

Select **New Web Service** (Figure B-5).

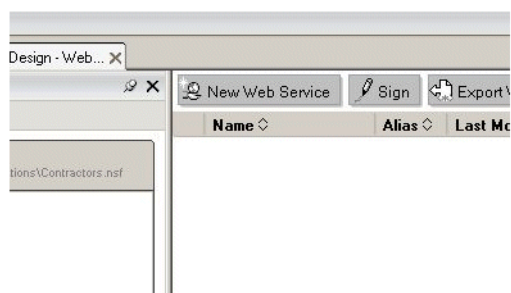


Figure B-5 Click New Web Service

The properties panel for the Web service will come up (see Figure B-6). Fill in the appropriate data. Note the check box for “Include operation name in SOAP action”. This setting is required.

- ▶ name = Expenses
- ▶ port type = Expense
- ▶ programming model = RPC
- ▶ SOAP message format = Doc/Literal
- ▶ port type name = Expenses
- ▶ service element name = ExpensesService
- ▶ the service port name = ServicePort

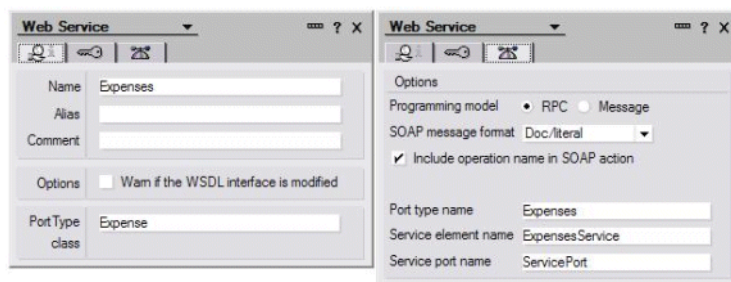


Figure B-6 Web service properties

The Lotus Domino server must be configured to support HTTP connections. To verify the HTTP process is running on your Lotus Domino 7 server, open a Web browser and enter the domain name of your server, for example, <http://DominoServerName.Company.com>.

Note that the Domino application NSF containing the example Web services may not use SSL. This setting is on the database properties dialog box (see Figure B-7 on page 205).

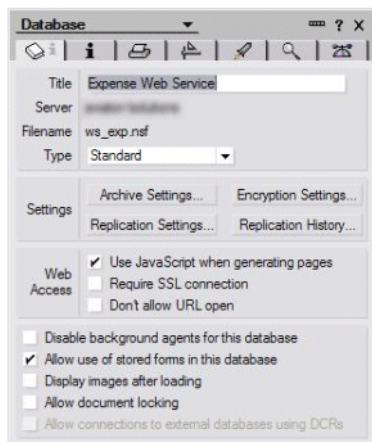


Figure B-7 The database properties dialogue box (SSL is disabled for the example Web service)

Ensure the default access to the example Web service database supports at least “Reader” access or explicitly create the “Anonymous” user and assign “Reader” access or greater. These settings are managed in the Access Control dialog box (see Figure B-8).

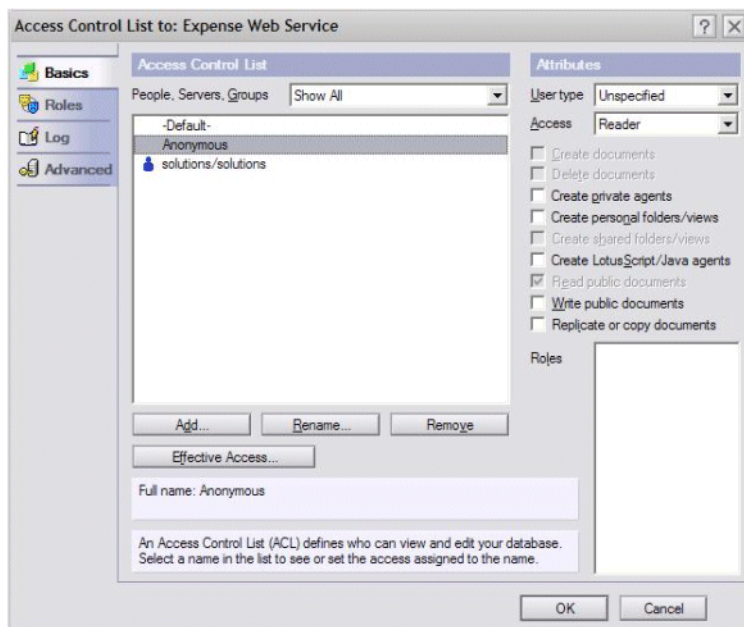


Figure B-8 Set the example database ACL

To verify the proper access to the example Web service, open a Web browser and enter the domain name of your server. Append, to the domain name, the directory where the Domino example Web service database resides. Finally, append the database name followed by forward slash, followed by the name of the Web service, followed by a question mark, followed by the text “wsdl” (without the quotation marks). For example:

`http://DominoServerName.Company.com/examples/ws_exp.nsf/expenses?wsdl`

In this example, the Web service database name is “ws_exp.nsf” and it resides in the “examples” directory of the Domino server. The name of the example Web services is “examples”.

If the URL is correct, the XML, representing the WSDL for the example Web services, will display in the browser. This URL may be used by the Workplace for Business Strategy Execution administrator when defining a data source.

Glossary

Actual Value. The most current data that represents the concrete performance of an objective. Objectives will have actual values throughout the objective's time period. The data may be manually entered, programmatically entered by retrieval from an external data source, or computationally "rolled up" from linked objectives.

Aggregation. Objectives can be represented as an aggregation, or collection of several objectives. Data is aggregated to reflect the status of an objective. This aggregation can combine a variety of data types to produce a single status, including averaged, weighted averages, minimums, maximums, and additions.

Alert. A notification targeted toward an individual, or set of persons, that contains information. Alerts appear in Workplace for Business Strategy Execution in the lower left side of a scorecard, and they are sent whenever certain changes to the scorecard are being made.

Alignment Linkage. Objectives and initiatives can contribute to each other's Actual Value. For example, client satisfaction for the Northeast directly impacts nationwide client satisfaction. This is called an Alignment Linkage, and exists when one number directly contributes to another.

Approver. The individual responsible for accepting the tactics being employed to achieve an objective. This person can approve of a scorecard, thereby locking it from editing, or reopen the scorecard for editing.

Attachment. A file object associated to a particular user.

Balanced Scorecard. A methodology for performance management that focuses on creating a measurable set of objectives to achieve an organization strategy.

Dashboard. Dashboards integrate data from a variety of sources and provide a unified display of relevant and in-context information for informed decision making. They contain portlets that pertain to specific objectives to encourage and facilitate action.

Data Sources. Data sources are repositories where data is stored and managed. Each data source defines where an objective/initiative's actual value will be gathered from as well as how to connect and gather the value. Data sources will be managed by administrators or individuals.

Dependency Linkage. Objectives and initiatives can affect each other without rolling up to each other's Actual Value. For example, client satisfaction may impact sales, although the client satisfaction score of 80% does not roll up to the sales figure of \$500,000. This is called a Dependency Linkage.

Financial year. A 12 month period where an organization plans the use of its funds; an accounting period of 12 months that does not necessarily begin on January 1.

History. The history of an objective is stored separate from the objective and represents all operations on an objective and its related objects. History shows how the objective has changed over time. For example, editing an actual value is reflected in the objective's history.

Initiative. Initiatives are action plans or action steps that are in place to help achieve an objective or improve its performance.

Labels. As the technology used in Workplace for Business Strategy Execution has broad applications in numerous industry segments, the portlets and components of Workplace for Business Strategy Execution support "re-labeling" for industry specific uses. The labels are stored and managed with multi-lingual support and have preset defaults for specific applications.

Linkages. An objective that depends on other objectives is said to be "linked". Linkages are directional, meaning one objective is the target of the link from the other objective. Linkages may be one-to-one or many-to-one.

Metric. The data used to evaluate how an objective is performing against a target. Metrics are used to determine the status of an objective. The parameters of the metric are used in a formula to calculate the status each time a new actual value is added for an objective.

Objectives. Objectives are specific goals to achieve a strategy. They have a target level of anticipated performance that may be expressed as a percentage, number, currency, or Boolean (yes/no). Objectives may also have milestones that divide the time period into some number of smaller periods, indicating milestone targets.

Organizational Unit. The hierarchical structure of an organization is useful for assigning cascading objectives and rolling up results. Organizational units are often specified by the directory. This information may be programmatically mapped. In those cases where the directory is flat (there is no organizational unit structure indicating who reports to whom) or the desired organizational structure does not directly map to the directory, organizational units will be managed as an administrative task. The smallest unit in an organization is an individual “member”. Workplace for Business Strategy Execution will use WebSphere Member Manager (WMM) as its interface and will not interact directly with the LDAP repository.

Owner. The “owner” refers to scorecards and objectives. The owner is the person to whom the scorecard or objective is assigned.

Perspectives. Different types of performance indicators can be broken down into different categories, for example, Financial, Learning and Growth, Client, Employee, and so on. Workplace for Business Strategy Execution will allow organizations to specify their own perspectives or pick sets of predefined perspectives. The purpose of the different perspectives is to ensure that scorecards look at performance in a “balanced view” of the business.

Roll-up. Metrics can roll up to determine the status of another objective. Roll-up can aggregate metrics of many different data types (percentage, currency, and numeric) and can support weighting of each metric.

Scorecard. A scorecard is a management tool that enables organizations to clarify their vision and strategy and translate them into specific goals or objectives. With the scorecard, organizations can track their performance in achieving the strategy. When fully deployed, the scorecard transforms strategic planning from an academic exercise to an integral part of managing and evaluating an enterprise’s objectives. Workplace for Business Strategy Execution maintains one scorecard for each user.

Status Map. The Status Map is a visualization aimed at showing a particular objective and the status of all the objectives contributing to it. By showing the person responsible and status, users have a quick way to look for problem areas. Users can choose to look for specific details, like “Show only red objectives”.

Status. The current performance of an objective as compared to its target and relative to its thresholds. An objective will have a target and thresholds, which determine what level of performance indicates green, yellow, and red. The status of an objective is determined by where the current value is in these thresholds.

Target date. The date on which a target is set to be reached.

Target. The intended result of an objective or a metric. When an objective has more than one milestone, the overall time period is divided into a collection of targets. The number of divisions is configurable by the user. For example, an annual sales goal might have quarterly targets. Another example is with a manufacturing defects goal with daily targets throughout the overall time period.

Value Types. The actual value of an objective can be a number, percentage, currency, Boolean, or status. In Workplace for Business Strategy Execution, all objective values will be one of these predefined types.

Related publications

The publications listed in this section are considered particularly suitable for a more detailed discussion of the topics covered in this Redpaper.

IBM Redbooks

For information about ordering these publications, see “How to get IBM Redbooks” on page 210. Note that some of the documents referenced here may be available in softcopy only.

- ▶ *IBM Workplace Services Express* Redbook, SG24-6758
- ▶ *Lotus Domino 7 Application Development*, REDP-4102

Other publications

These publications are also relevant as further information sources:

- ▶ Kaplan, et al, *The Balanced Scorecard: Translating Strategy into Action*, Harvard Business School Publishing, 1996, 0875846513
- ▶ Kaplan, et al, *The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment*, Harvard Business School Publishing, 2001, 1578512506
- ▶ Kaplan, et al, *Strategy Maps: Converting Intangible Assets into Tangible Outcomes*, Harvard Business School Publishing, 2004, 1591391342
- ▶ Niven, *Balanced Scorecard Diagnostics: Maintaining Maximum Performance*, Wiley, John & Sons, Incorporated, 2005, 0471681237

Online resources

These Web sites and URLs are also relevant as further information sources:

- ▶ IBM WebSphere Portal Information Center
http://publib.boulder.ibm.com/infocenter/wpdoc/v510/index.jsp?topic=/com.ibm.wp.ent.doc/wpf/intr_ldap.html
- ▶ IBM Workplace Services Express Information Center
http://publib.boulder.ibm.com/pvc/wse/200/smb/en/InfoCenter/wpf/intr_ldap.html
- ▶ IBM Workplace for Business Strategy Execution Help
<http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp>
- ▶ IBM Workplace for Business Strategy Execution Product Documentation
http://publib.boulder.ibm.com/infocenter/wbsehelp/v1r0/index.jsp?topic=/com.ibm.bse.doc/bse/inst_main_ovr.html

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Workplace for Business Strategy Execution



Enable your organization to execute its strategy

Cascade and link objectives organization-wide

Monitor via customized Scorecards and Dashboards

IBM Workplace for Business Strategy Execution utilizes portal, collaboration, and application integration technologies and adds unique capabilities specifically for organizations to manage the achievement of objectives - all presented to the user in a single, useful user experience. Effective strategy execution can be improved by effectively aligning business units and workgroups to corporate objectives, assigning accountability, monitoring progress, and accelerating exception resolution. Workplace for Business Strategy Execution delivers intuitive alignment and insight through actionable scorecards and in-context dashboards.

This IBM Redpaper will guide you through the introduction of Workplace for Business Strategy Execution in your environment using a two organization scenario - one large, one small - to illustrate.

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